

**San Diego County
Water Authority
2005 Public Opinion Poll**

Prepared for

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Water Authority
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Executive Summary

The San Diego County Water Authority has conducted a public opinion survey within its service area in San Diego County in order to measure the region's opinion regarding various water-related issues. Rea & Parker Research was selected to be the lead consultant for this 2005 Public Opinion Poll. Rea & Parker Research, in association with the Social Sciences Research Laboratory of San Diego State University, also conducted surveys for the Water Authority in 2000, 2003, and 2004. This 2005 study has established the following objectives:

- Obtain scientifically reliable and sufficiently robust results to determine water use patterns among activities that are known to consume significant quantities of water;
- Determine opinions and perceptions of various issues, including:
 - Perceptions of water reliability,
 - Level of support for the Water Authority's major water supply diversification programs, including recycled water, water conservation, additional storage, and seawater desalination,
 - Expectations within the resident population for additional educational and planning activities by the Water Authority.
- Obtain demographic data about the population for use in descriptive analysis and crosstabulations of data that can result in new, optimally targeted and tailored public programs.

This continuity of survey administration greatly facilitates the tracking of responses from year-to-year, including the consistency of wording and interviewing that adds to the statistical reliability of such comparisons.

The survey was conducted by a random telephone sample of 735 respondents, which equates to a margin of error of +/-3.6% at the 95% confidence level. Respondents are predominantly White (76%), with 11% Hispanic/Latino, 6% Asian/Pacific Islander, 5% African-American/Black, and 1% American Indian/Native American. Respondents earn a median household income of \$63,600 per year (22% earning \$100,000 or more and 15% earning under \$25,000). They have a median age of 48 years and have lived in the county for a median of 23 years. A plurality (38%) is Republican and 30% are Democrats. Among respondents, 51% possess a Bachelor's Degree or more, with 14% having a High School education or less. Home ownership percentage is 71%, with a mean of 2.84 persons per household.

Survey Findings

The 2005 Public Opinion Poll report has been divided into five essential information components as follows:

- Attitudes and opinions about general news/current event issues,
- Attitudes and perceptions concerning water reliability,
- Water usage and conservation,
- Attitudes and perceptions concerning seawater desalination and recycled water,
- Recommended policies and programs.

Attitudes and Opinions about General News/Current Event Issues

- Housing Costs and Traffic are the two most important issues facing the residents of San Diego County. It is also clear that the financial and political problems that have beset the City of San Diego have registered very strongly with the public. Growth, which has so

dominated surveys such as this in the past (specifically the 2000 SDCWA survey and then shared the stage with Housing Costs and Traffic in 2003), now ranks seventh behind Housing Costs, Traffic, City of San Diego Financial/Political Difficulties, Government Mismanagement, Cost of Living, and Immigration as the most important issues facing the public currently in 2005.

- In terms of growth, almost half of the residents of the Water Authority service area believe that most of San Diego's growth is due to the highly desirable climate that the region enjoys. Developers are allocated very little of the cause of growth (5%). Of interest is that only 4% see the primary cause of growth to be the natural excess of births over deaths, which is the true fundamental cause of population growth.

Attitudes and Perceptions Concerning Water Reliability

- Two-thirds of SDCWA service area residents feel that the current level of reliability for the water supply is good, which is the same as in 2004 but slightly less than was indicated in the 2003 and 2000 surveys.
- Regarding the reliability of water by 2030, with growth forecasts of 1 million more county residents, respondents' confidence in local water agencies' ability to supply water reliably declines by 22% from their current levels of perceived reliability. This is less of a decline from current reliability to future reliability than was shown in 2004 and 2003 when the reliability perception dropped by 28% from current to future in each year.
- Groups that indicated a higher degree of confidence in future reliability are: men, Republicans and those residents not registered to vote.
- When asked how the very heavy rains of this past winter that filled many reservoirs might have affected the region's water supply, only 6% thought that the rains eliminated or greatly reduced the region's need to purchase water; 50% thought that there was no real impact.
- Groups that thought that the rains were more beneficial were shorter term residents of the county (1-10 years), Spanish language respondents, non-Whites (especially Asians), and larger households.
- A plurality of residents considers local water sources to be a more reliable source of drinking water than imported water, and two-thirds of those who feel that way support the increased development of local water sources even if these sources are more expensive than imported water.
- As education increases, so does favoring local supplies even if more expensive to develop, and the same pattern exists for age—older residents favor local supplies more. Whites also favor local supplies more than do all other ethnicities.

Water Usage and Conservation

- High efficiency clothes washers have garnered a substantial portion of the new washer market—37% having purchased new washers within the past three years—with more than half being high efficiency washers. Somewhat less than half (42%) of high efficiency clothes washers were purchased using a voucher or rebate program, which was apparently of minor incentive in that 86% said that they would have made the purchase even without the voucher or rebate.
- Regarding new toilet purchases, 18% of households indicated that they were very likely to purchase a new water saving toilet if they learned that the \$75 rebate were going to end in the next 12 months.

- 15% of San Diego County Water Authority households have water softeners in their home, divided relatively equally among On-Demand Systems, Preset Timer Softeners, and Canister Replacement Systems.
- Among the 68% of households with responsibility for maintaining some landscape, more than one-half have automatically controlled sprinkler systems, of which in excess of three-fourths have adjusted their automatic controller two or more times during the past year (mean adjustments equal 3.76 times per year).
- Among those 68% with responsibility for some landscape, 29% have heard about weather-based irrigation controllers that automatically adjust landscape watering based on changing weather conditions.
- Only 9% of the 29% (2% of the total population) who had heard about these controllers had actually had one installed—among the others, more than one-third said that they are very likely or somewhat likely to purchase a weather-based controller in the coming 12 months, with incomes of \$75,000 and above, ages 18-34, and three or more persons in the household most likely.
- Again among the 68% with some landscape responsibility less the 2% who already have weather-based controllers (for a total of 66% of the population), approximately one-half of the 66% (30%) indicated that a \$65 voucher would make their purchase more likely. Greatest movement in terms of increased likelihood was among those already very likely or somewhat likely to make that purchase—three-fourths of those very unlikely stated that the availability of a voucher made no difference to them.
- Fewer residents with landscaping responsibility are moved toward purchase by the information that this controller could cut \$30 per year from their water bill than are moved by the one-time voucher. Once again, positive movement is most pronounced among those already interested.
- Almost three-fourths of all households have seen or heard the Water Authority's messages to conserve water during the past two hot summers. Television has been the primary source of this information, followed by radio and newspapers.
- Among those who both have landscaping responsibility and heard or saw the messages, 72% recall having taken specific steps to reduce their outdoor consumption of water in response to those messages or have taken previous steps. In particular, reduced number of days watering and a general statement that water consumption was reduced (either by reduced duration of operating sprinklers and/or by reduced number of days watering), followed by irrigating during off-peak hours and adjusting the duration of watering.

Attitudes and Perceptions Concerning Recycled Water and Seawater Desalination

- There is considerable support (more than two-thirds) for the San Diego County Water Authority to improve reliability and diversity of water supply through utilizing seawater desalination in lieu of importing more water.
- Out of eight potential uses of recycled water, seven were very strongly supported and one was well supported. All uses of recycled water demonstrated huge increases in support over 2004 results, which were also quite favorable:
 - freeways and golf courses (96%, of whom 88% strongly favor such use),
 - watering sports fields and parks (91%--78% strongly),
 - watering landscape and common areas in multi-family housing (89%--72% strongly),
 - industrial processing (87%--72% strongly),
 - watering residential front yards (87%--68% strongly),
 - watering playgrounds at schools (81%--63% strongly),
 - agricultural irrigation (78%--60% strongly),

- recreational lakes (63%--39% strongly).
- Support for recycled water derives in large part from homeowners and higher income, more educated, older residents who also tend to be White and do not associate developers with causing growth.
- Weaker levels of support and, in a few cases, strong opposition come from lower income and lesser educated respondents, individuals who are not registered to vote, renters, and those who tend more than the general population to blame developers for growth.
- When comparing the perceived importance of developing recycled water with the importance of conservation, seawater desalination, and additional local water storage projects, there is one instance of majority support for water recycling over any of these alternatives and two pluralities.
 - 46% find recycled water to be more important than conservation; 35% think that it is less important—a reversal of percentages from 2004.
 - 48% indicate that recycled water is more important than seawater desalination, with 33% thinking that it is less important—a small gain for water recycling over 2004.
 - 52% feel that recycled water is more important than additional storage projects, and 27% feel that local water storage is more important—another gain for water recycling over 2004.
- An importance hierarchy is evident from these comparisons. Water recycling is seen as more important than conservation, seawater desalination, and additional storage, in descending order of importance.
- Water recycling is particularly favored over conservation by Hispanics/Latinos, Ages 55-64, Residents of San Diego County for more than 40 years, and Whites.
- Water recycling is seen as less important than conservation by Asians, Ages 18-24, and Residents of San Diego County for 1-10 years.

Recommended Policies and Programs

- In order to combat the potential bias of asking respondents what they think is the single most critical thing the San Diego County Water Authority should do to ensure a safe and reliable water supply for San Diego County residents and businesses after asking the series of questions about water recycling, conservation, and seawater desalination, the 2005 Public Opinion Poll asked that question two times—once early in the questionnaire before anything related to water policy was addressed and again at the end of the questionnaire for comparison purposes to 2004.
- The first implementation of the question, unaffected by the survey questions, shows much uncertainty (30%) and a preference for utilizing Seawater Desalination among all other programs and policies (17%). Conservation (11% including conservation education), More Storage (8%), Quality Control (8%), and Importing More Water (7%) followed, with Recycled Water receiving a relatively small response of 3%.
- For the second implementation of the question, uncertainty declined from 30% to 17%. Seawater Desalination increased slightly from 17% to 18%. Conservation grew from 11% to 16% (including conservation education) and Recycled Water took a substantial leap from 3% to 15%. Quality Control and Diversification followed with 8% each. These results are not significantly dissimilar from the 2004 results that occurred from the question that was also placed near the end of the survey.
- What emerges is a fluidity of opinion that shows how loosely wedded respondents are to how they wish to have their water supply made as reliable as possible. In no category of the first response did even half of the respondents provide the same answer the second

- time that the question was administered. Seawater Desalination and Water Recycling came closest to holding their respondents (48% each).
- Within these shifting responses, however, residents of the region have stated that they do want their water supply to be as reliable as possible and that they will support an assortment of programs and policies in that endeavor.

Conclusions

There are strong indications of support for the work and the policies and programs of the San Diego County Water Authority from the region's residents demonstrated in the 2005 Public Opinion Poll.

Residents understand certain of the risks to the future reliability of their water supply, and they are willing to consider local supply development over increased imports (in particular both increased use of recycled water and seawater desalination) to a very significant degree in order to protect and ensure that reliability. Residents have demonstrated an increased confidence over the past three years in the Water Authority to provide a reliable water supply not only at present, but also well into the future.

There is strong recognition of the Water Authority's conservation messages during the past two summers, and residents have responded through very specific, recommended actions.

Although there is some fluidity in choosing a preferred option for the Water Authority to provide water in the future, residents of the region have stated with clarity that they do want their water supply to be as reliable as possible and that they will clearly entertain a vast array of programs and policies that can accomplish that for them.

The results of this survey should be viewed as ratification by the public of the importance of the work done by the Water Authority and as an expression of the confidence of the region in the value and quality of the work in which the Water Authority is, has been, and will be engaged.

Introduction and Methodology

The San Diego County Water Authority has, over the years, conducted a public opinion survey within its service area in San Diego County in order to measure public opinion regarding water issues. Rea & Parker Research was selected to be the lead consultant for this 2005 Public Opinion Poll. Rea & Parker Research, in association with the Social Sciences Research Laboratory of San Diego State University, also conducted surveys for the Water Authority in 2000, 2003, and 2004. This continuity of survey administration greatly facilitates the tracking of responses from year-to-year, including the consistency of wording and interviewing that adds to the statistical reliability of such comparisons.

The purpose of the 2005 research was to:

- Obtain scientifically reliable and sufficiently robust results to determine water use patterns among activities that are known to consume significant quantities of water.
- Determine opinions and perceptions of various issues, including
 - Perceptions of water reliability,
 - Level of support for the Water Authority's major water supply diversification programs, including recycled water and seawater desalination,
 - Expectations within the resident population for additional educational and planning activities by the Water Authority.
- Obtain demographic data about the population for use in descriptive analysis and crosstabulations of data that can result in new, optimally targeted and tailored public programs.

Sample

The survey was conducted by a random telephone sample of 735 respondents in order to secure a margin of error +/-3.6% @ 95% confidence. This figure represents the widest interval that occurs when the survey question represents an approximate 50%-50% proportion of the sample. When it is not 50%-50%, the interval is somewhat smaller. For example, in the survey findings that follow, 42.4% of respondent households that purchase a new high-efficiency washing machine in the past 12 months used a rebate program to aid in that purchase. This means that there is a 95% chance that the true proportion of the total population of the Water Authority's service area that used a rebate to purchase a high-efficiency washer in the past 12 months is between 38.8% and 46.0% (42.4% +/- 3.6%).

The random sample was selected by random digit dialing from the zip codes contained within the San Diego County Water Authority service area. The survey and pretest were conducted between June 7, 2005 and June 23, 2005. The survey response rate was 37%, based upon completed interviews in comparison to all eligible (and estimated to be eligible) phone numbers, including

busy signals, answering machines, call backs, and no answers. Mean survey administration time was 16.37 minutes per respondent.

Survey Instrument

The survey instrument contained 41 questions, including 50 individual survey items (variables). The survey instrument was administered in both English and Spanish. A copy of each is attached in the Appendixes. A total of 15 respondents elected to respond in Spanish, which represents fewer such respondents than in 2004 (48 Spanish language respondents) or 2003 (29 Spanish language respondents).

Respondent Characteristics

Table 1 presents certain demographic characteristics of the survey respondents and also provides the 2004 characteristics for comparative purposes. In 2005, respondents are predominantly White (76%), with 11% Hispanic/Latino, 6% Asian/Pacific Islander, 5% African-American/Black, and 1% American Indian/Native American. Residents earn a median household income of \$63,600 per year (22% earning \$100,000 or more and 15% earning under \$25,000). They have a median age of 48 years and have lived in the county for a median of 23 years. A plurality (38%) is Republican; 30% are Democrats. Among respondents, 51% possess a Bachelor's Degree or more, with 14% having a High School education or less. Home ownership percentage is 71%, with a mean of 2.84 persons per household. Among Asian respondents, 64% are homeowners; Whites are 76% homeowners; Blacks/African-Americans and Hispanics/Latinos 44% and 52%, respectively.

These demographic characteristics are similar to the distribution of 2004 respondents, with all differences well within the margin of error other than a slightly higher White respondent distribution with a correspondingly higher income. Despite that difference, political party, home ownership, and persons per household, in particular, remained essentially unchanged.

Table 1
San Diego County Water Authority Survey Respondent Characteristics

Demographic Characteristic	Percentage 2005	Percentage 2004
Gender		
Male	50%	50%
Female	50%	50%
Major Residential Zip Codes		
92021	4%	3%
92129	4%	3%
91910	4%	4%
92056	3%	2%
92024	3%	1%
92020	3%	2%
92054	3%	4%
92071	3%	2%
Median Age (Years)	48	47
Median Number of Years Lived in Community	23	22
Highest Grade/Level of School Completed		
High School or Less	14%	18%
Some College	35%	37%
Bachelor's Degree	25%	20%
Some Graduate School	26%	25%
Ethnicity		
White	76%	67%
Latino/Hispanic	11%	17%
African-American/Black	5%	5%
Asian/Pacific Islander	6%	6%
Native American	1%	1%
Mixed Ethnicities	1%	4%
Voter Registration		
Republican	38%	36%
Democrat	30%	29%
Other Party Affiliation	2%	2%
Nonpartisan	16%	14%
Not Registered to Vote	14%	19%
Median Household Income	\$63,600	\$55,500
Home Ownership Percentage	71%	70%
Mean Number of Persons per Household	2.84	2.85

Survey Findings

The 2005 Public Opinion Poll report has been divided into five essential information components as follows:

- Attitudes and opinions about general news/current event issues,
- Attitudes and perceptions concerning water reliability,
- Water usage and conservation,
- Attitudes and perceptions concerning seawater desalination and recycled water,
- Recommended policies and programs.

The balance of this report will address these components in detail. Each section will begin with a very brief abstract, or summary of highlights within the ensuing section, in order to orient the reader to what is to follow.

Charts have been prepared for each of these components that depict the survey results for the 2005 survey and for the 2004, 2003, and 2000 surveys where questions have been repeated and can be directly compared. Each component will include a discussion of the findings from the 2005 survey, with key comparisons drawn regarding the prior year results. Detailed statistical frequency distributions and lists of open-ended responses to survey questions are contained in the Appendixes.

Lastly, subgroup analyses for different age groups, various levels of education, gender, home ownership/rental status, household size, residential tenure in the community, different income categories, voter registration differences, and ethnicity of residents of the service area will be presented in a succinct, boxed and bulleted format when statistical significance and relevance warrants such treatment. Crosstabulations and Analyses of Variance statistical tables are contained in a separate technical submittal package.

Attitudes and Opinions about General News/Current Events

SUMMARY: Housing Costs and Traffic are the two most important issues facing the residents of San Diego County. Growth, which has so dominated surveys such as this in the past (specifically the 2000 SDCWA survey and then shared the stage with Housing Costs and Traffic in 2003), now ranks seventh behind Housing Costs, Traffic, City of San Diego Financial/Political Difficulties, Government Mismanagement, Cost of Living, and Immigration as the most important issues facing the public currently in 2005. It is clear that the financial and political problems that have beset the City of San Diego have registered very strongly with the public.

In terms of growth, almost half of the residents of the Water Authority service area believe that most of San Diego's growth is owed to the highly desirable climate that the region enjoys. Only 5% think that developers are the primary cause of growth. Of interest is that only 4% see the primary cause of growth to be the natural excess of births over deaths, which is the true fundamental cause of population growth.

Chart 1 shows that the most important issues that residents of San Diego County identified are Housing Costs (16%) and Traffic (16%), followed by the Fiscal and Political Difficulties present in the City of San Diego (14% including Mayoral Election responses), Government Mismanagement (11%), and High Cost of Living (10%). In 2004 Housing Costs were named by 20% of respondents, Traffic by 15%, and Cost of Living by 18%. The City of San Diego Fiscal/Political Difficulties response is new to the survey results in 2005; Government Mismanagement received a 4% mention in 2004.

High degrees of mention in 2004 but declining in importance in 2005 are Growth/Development (11% in 2004 to 6% in 2005), and Economy/Jobs (8% in 2004 to 5% in 2005). Water Supply and Quality received a 2% response (3% in 2004). The "Other" category is a compilation of all the other responses that did not receive enough mention to merit an individual listing in the chart, including the Environment and Homelessness. These and the other responses can be viewed in the Appendixes, where the full listing of responses is displayed.

In the 2003 survey, Housing Costs, Traffic and Growth/Development all tied as the leading important issues at 15%. In the 2000 survey, Growth far outdistanced all other responses with 31%, followed by Traffic 14% and Crime 11%.

Respondents were also asked to identify the factor they thought to be most responsible for population growth in San Diego County. **Chart 2** shows that almost half (48%) believes that most of San Diego's growth is owed to the highly desirable climate that the region enjoys. Immigration follows at 18% and then Jobs (7%), Beautiful Area (5%), Developers (5%), and Natural Births over Deaths, which is the true fundamental cause of population growth (4%).

Chart 1

Most Important Issue Facing San Diego County Residents Today

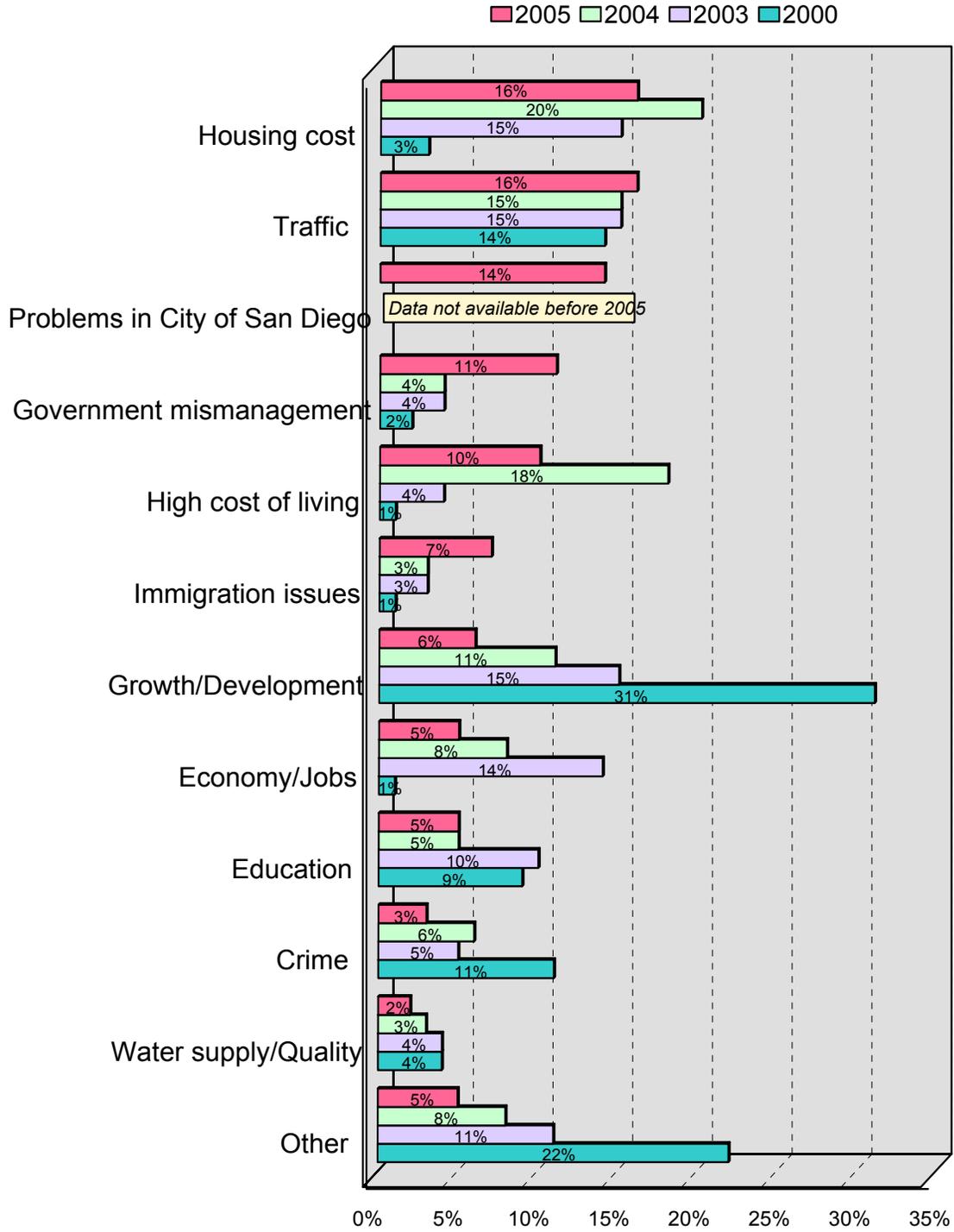
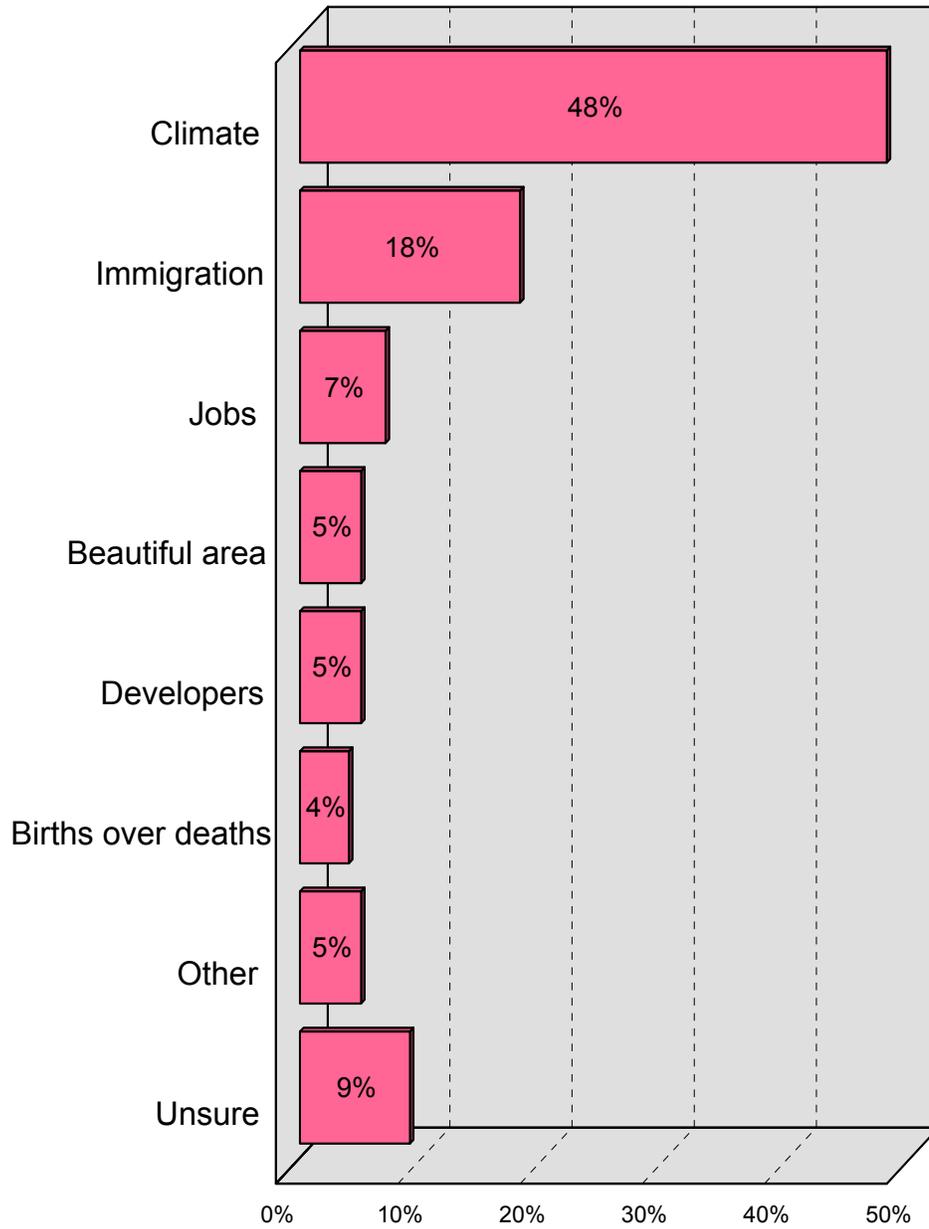


Chart 2

Factor Most Responsible for San Diego County Population Growth



- Climate was the reason cited by 58% of Whites, 47% of Blacks/African-Americans, 40% of Hispanics/Latinos, 27% of Asians, and 17% of Native Americans.
- Jobs were the reason cited by 6% of Whites but 12% of all other ethnicities, especially Native Americans (33%).
- Whites thought immigration was the main reason 18% of the time in contrast to 23% of non-Whites.
- Whites cited natural births over deaths (4%) less than did all other ethnicities (8%).

Table 2 indicates the demographic composition of those respondents who attribute the cause of growth mostly to developers. These respondents resemble the general survey population except for being more inclined to be Democrats (43% versus 30%), being somewhat better educated (37% graduate work versus 26%), earning higher incomes (\$75,000 versus \$63,600), and significantly more likely to be homeowners (86% versus 71%).

Table 2	
Demographic Profile of Respondents Who Ascribe Cause of Growth to Developers	
Characteristic	Percentage
Gender	
Male	49%
Female	51%
Median Age (Years)	47
Median Number of Years Lived in Community	22
Highest Grade/Level of School Completed	
High School or Less	9%
Some College	37%
Bachelor's Degree	17%
Some Graduate School	37%
Ethnicity	
White	74%
Latino/Hispanic	9%
African-American/Black	0%
Asian/Pacific Islander	9%
Native American	3%
Mixed Ethnicities	5%
Voter Registration	
Republican	31%
Democrat	43%
Other Party Affiliation	6%
Nonpartisan	14%
Not Registered to Vote	6%
Median Household Income	\$75,000
Home Ownership Percentage	86%
Mean Number of Persons per Household	2.83

Attitudes and Perceptions Concerning Water Reliability

SUMMARY: *Water Authority service area residents feel that the current level of reliability for the water supply is good. Extending reliability to the year 2030, including growth forecasts of 1 million more County residents reduces confidence in local water agencies' ability to supply water reliably. However, there has been a noteworthy increase in confidence over the past three years that the Water Authority will provide reliable service in the future.*

Residents do not think that the heavy rains of winter did very much to help the region's dependence on imported water, and they believe that local water supplies are somewhat more reliable than imported water, including a willingness among those who feel that way to favor development of local water supplies even if these supplies are more expensive than imported water.

Chart 3 shows that Water Authority service area residents believe that the current water supply is as reliable as they thought that it was in 2004 and somewhat less reliable than they thought in 2003 and 2000. Among the residents of the Water Authority service area, 67% of residents find that the current supply of water is either somewhat (41%) or very (26%) reliable, with 18% very or somewhat unreliable and 14% Unsure.

Another way to analyze reliability is by converting the responses to a scale of 1-5, where 1 represents responses of "Very Reliable" and 5 represents "Very Unreliable." Doing so permits the calculation of a mean reliability index of 2.28, which corresponds to an average of "Somewhat Reliable" and is exactly the same as in 2004. The use of means permits a more precise measure of differences among subgroups of the service area population. Utilizing this analytical tool, it is determined that there are no statistically significant differences among subgroups regarding their perception of current reliability. In 2004, the only difference was between Hispanics/Latinos (mean reliability index=1.91) and Whites (mean index=2.33). In 2005, their ratings are 2.36 and 2.28, respectively, indicative of a decline in the perception of water supply reliability among Latinos and a minor increase among Whites.

Extending the perception of reliability to the year 2030, including growth forecasts of 1 million more county residents, reduces confidence in local water agencies' ability to supply water reliably such that 9% are very confident in such reliability and 36% are somewhat confident (**Chart 4**)—a 45% total confidence factor for 2030, or 22% decline from the current perception of reliability (67%). This marks an increase in confidence about 2030 from 2004 (7% very confident and 31% somewhat confident).

Chart 3

Reliability of Current Water Supply

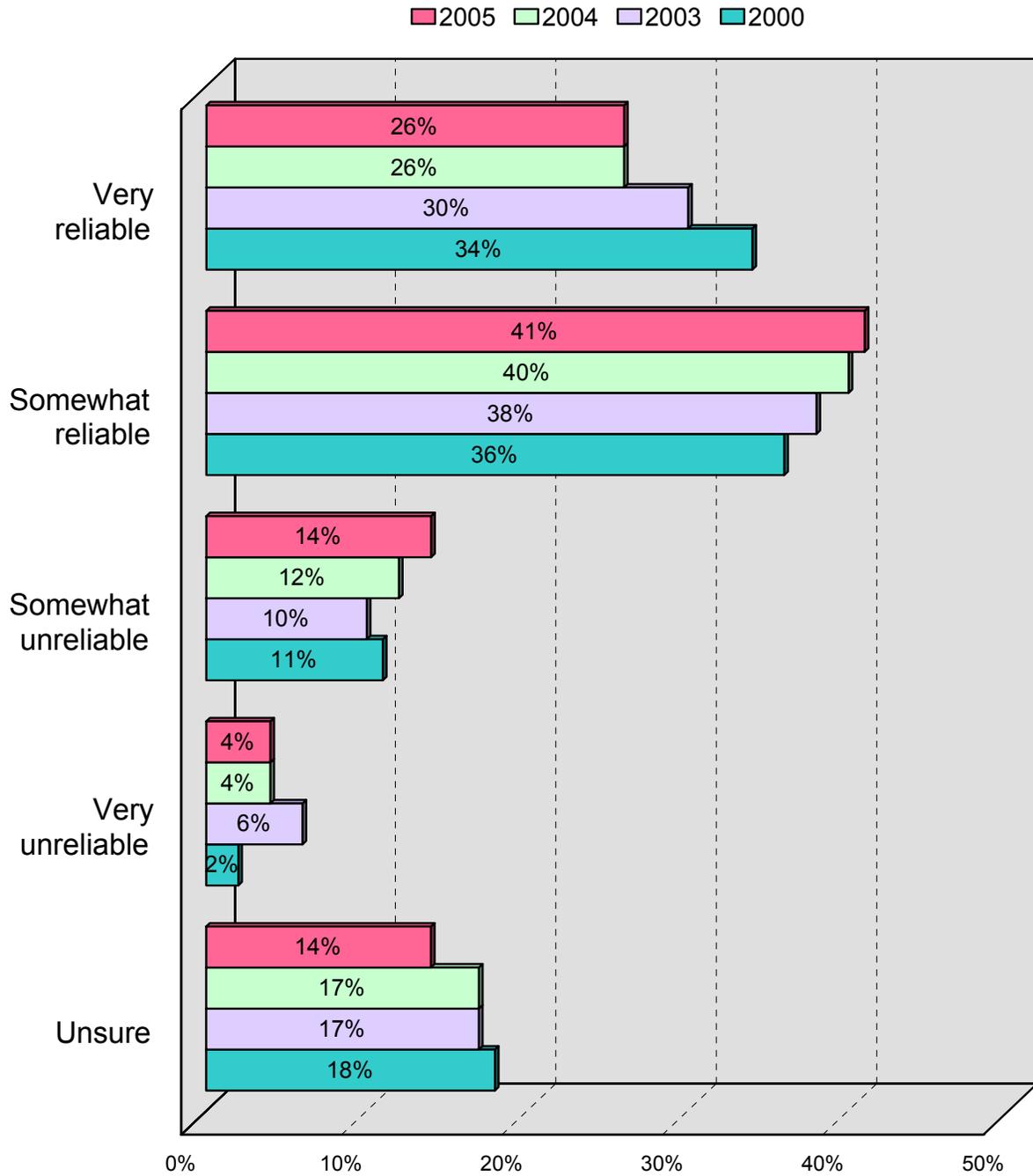
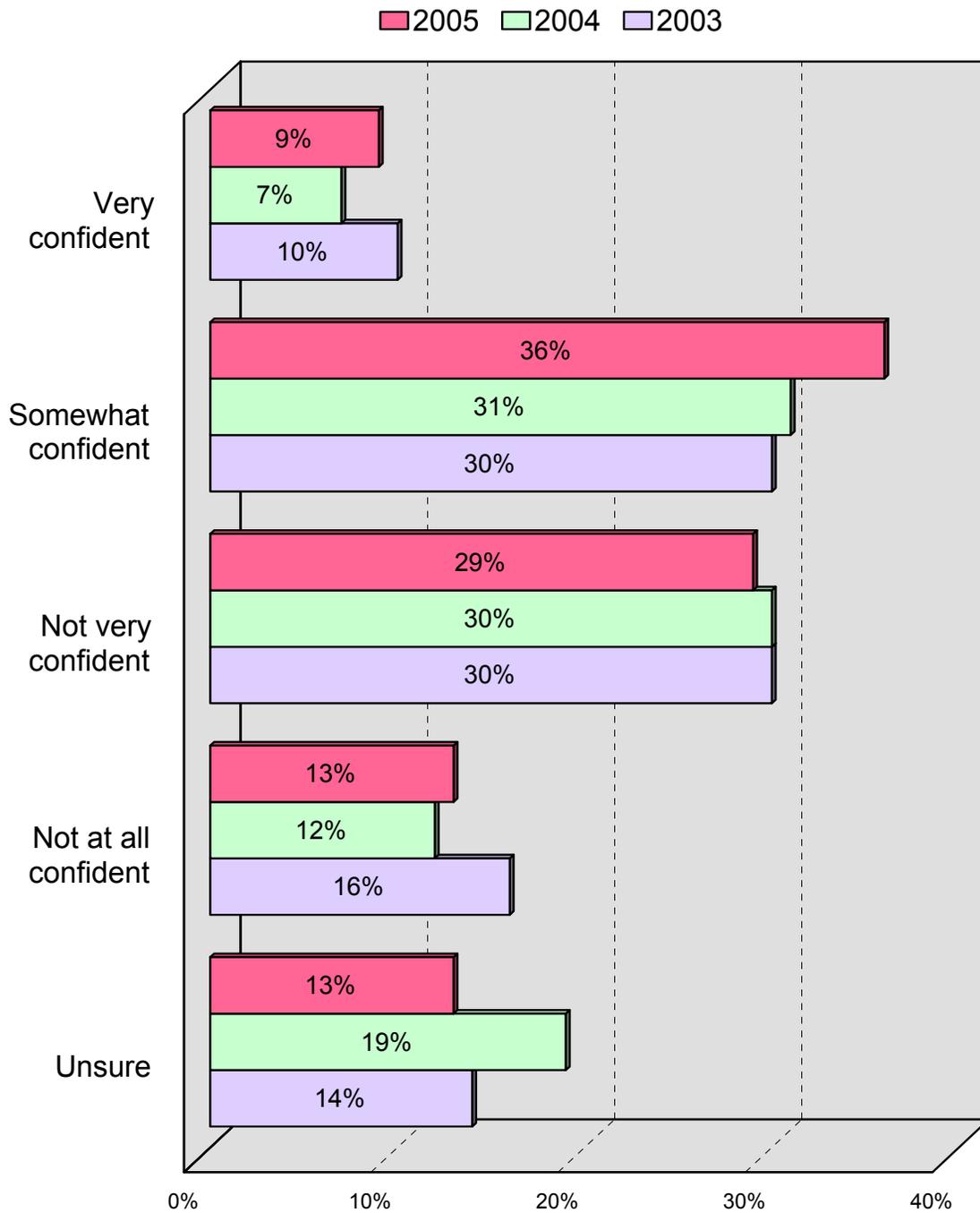


Chart 4

**Ability of Water Agencies to Provide
a Reliable Water Supply Through Year 2030***



In the 2003 and 2000 surveys, similar, although not duplicate questions were asked of respondents about future reliability. The 2000 respondents were asked: “Looking ahead to about 10 years from now, do you think the water supply in this County will be more reliable, about the same as now, less reliable, or are you not sure?” Less reliable received 42% of the responses, which is the same as the “not very confident” and “not at all confident” results from the 2005 survey and the 2004 poll. In 2003, the question referred to 1 million more residents by 2020 (instead of 2030) and asked about reliability at that time in the future. In 2003 46% responded that they were not confident or not at all confident, again marking strong consistency during the 5 years from 2000 to 2005.

Utilizing the mean index tool once again (1=Very Confident and 5=Not At All Confident) provides a mean reliability score for 2030 of 3.01—a neutral indication of confidence by the population, similar to 2004 (3.09). Within this population, however, in contrast to current reliability, there are a few subgroup differences of significance.

Groups with relatively high or low confidence in future reliability are as follows:

- Men show a higher degree of confidence (2.91) than do women (3.11).
- Republicans (2.95) and not registered to vote residents (2.79) are more confident than those who are registered in political parties other than Democrat and Republican (3.93).

When asked how the very heavy rains of this past winter that filled many reservoirs might have affected the region’s water supply, 6% thought that the rains eliminated (2%) or greatly reduced (4%) the need to purchase water; 38% thought that the need was somewhat reduced, and 50% thought that there was no real impact (**Chart 5**).

Significant differences in opinion about the effect of these rains are found between:

- 1-10 year residents (14% greatly reduced or eliminated) and 11 and more years of residence (3%),
- English language respondents (6%) and Spanish language respondents (29%),
- 1-4 person households (5%) and 5 or more person households (12%),
- Whites (4%) and all other ethnicities (13%), especially Asians (23%).

Chart 6 indicates that a small plurality (44%) of residents considers local water sources to be a more reliable source of drinking water than imported water (37%), with 16% unsure. **Chart 6** also shows that among the 63% of respondents who do not favor the reliability of imported water, 63% would advocate increasing the development of local sources even if these sources were more

expensive than imported water. Out of the total population, this represents approximately 40% (63% of the 63% who do not think that imported water is more reliable than local sources).

Significant differences exist in perceptions of the reliability of local versus imported water exist as follows:

- 61% of 1-20 year residents think that local supplies are more reliable versus 50% of residents of 21 and more years.
- 1-2 person households that do not favor imported water as more reliable are more inclined to agree with developing local sources even if they are more expensive (79%) than are households of 3 or more persons (61%).
- As education increases, so does favoring local supplies even if more expensive, ranging from 53% of those with high school and less education to 78% of those who have done graduate work.
- As age increases the same pattern exists, with 42% of those 18-24 willing to develop more expensive local supplies up to 77% of those 45 and older.
- Whites favor local supplies even if more expensive (78%) more so than do all other ethnicities (52%).

Chart 5

Effect of Recent Heavy Rains on
Need to Purchase Imported Water

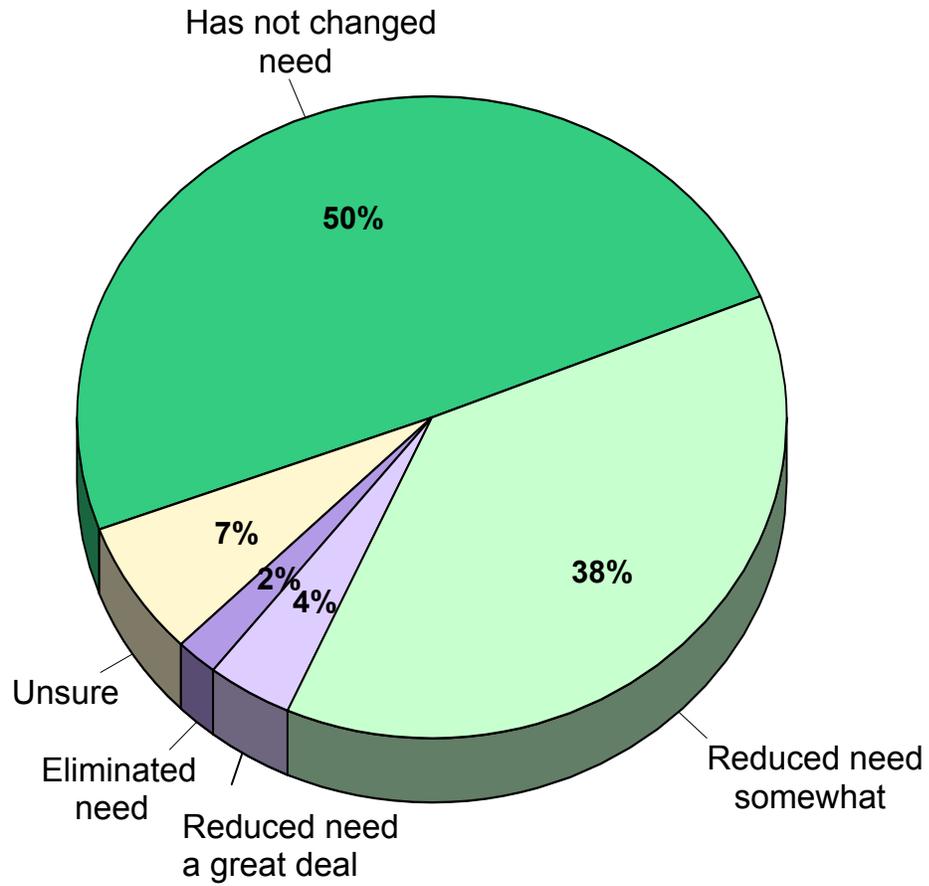
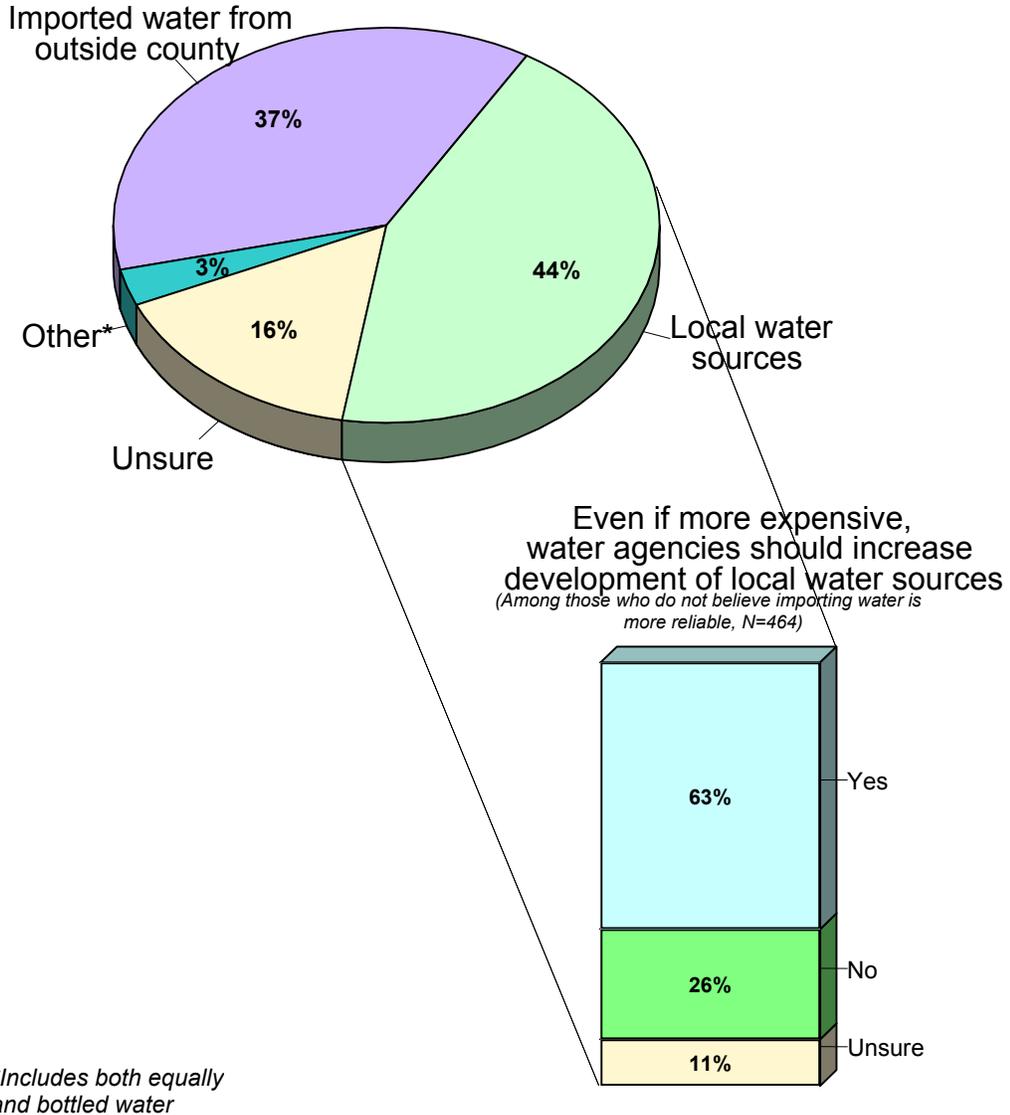


Chart 6

Which is More Reliable Source of Drinking Water: Imported or Local



Q8, Q8a

Water Usage and Conservation

SUMMARY: High efficiency clothes washers have garnered a substantial portion of the new washer market, almost half of which were purchased using a voucher or rebate program. There was a relatively small interest in purchasing a new water-saving toilet even if the voucher program expires in 12 months. Further, the water softener market represents approximately one-sixth of San Diego County households.

Most San Diego County households with landscape responsibility have automatic sprinkler systems that they adjust almost 4 times per year on average. Knowledge of automatically adjusting weather-based controllers is found in less than one-third of households, with actual installations of these controllers very limited.

Approximately one-third of those households without the weather-based controller demonstrated some interest in the possibility of purchasing one, especially after learning of the availability of a \$65 voucher.

Almost three-fourths of all residents recall seeing or hearing messages from the Water Authority during the past two summers to conserve water, predominantly on television, and almost three-fourths of those who heard or saw these messages undertook steps to reduce their outdoor water consumption, including fewer watering days, shorter duration of watering, and watering during off-peak hours.

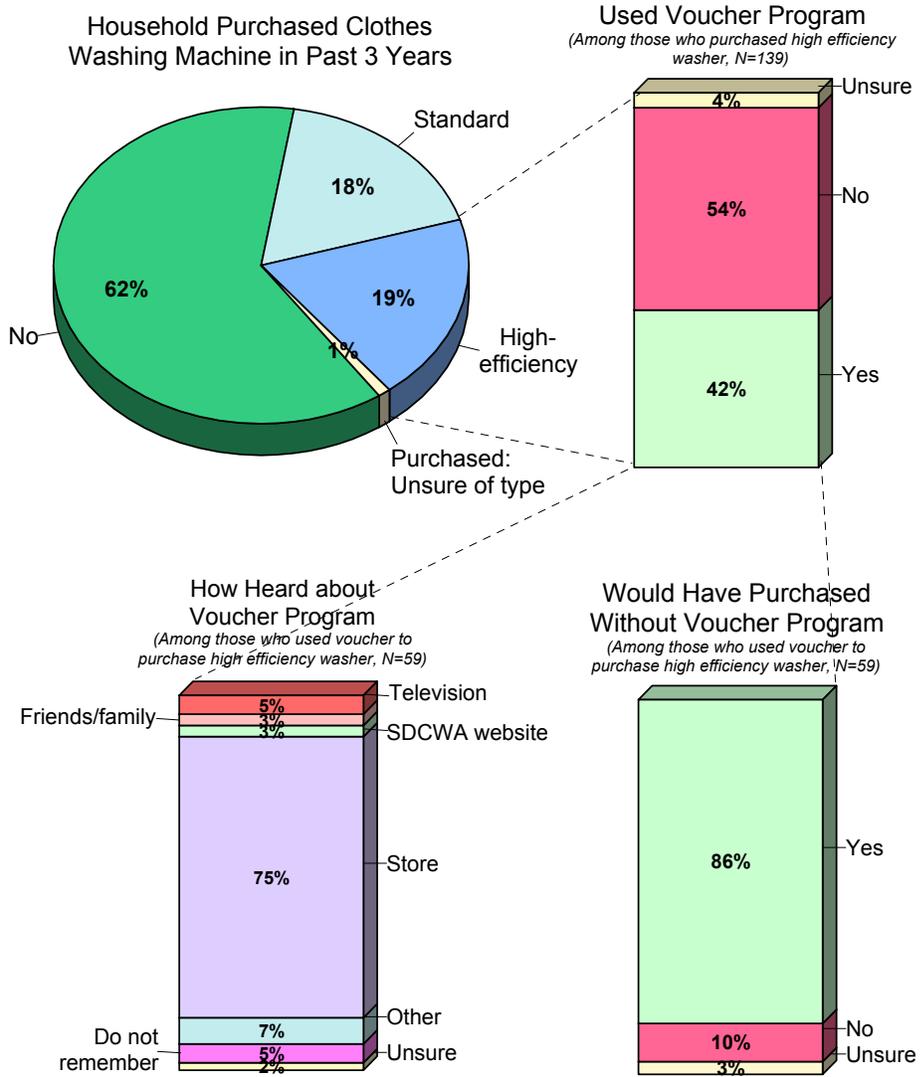
A series of questions was posed to residents of the San Diego County Water Authority service area concerning water usage and conservation regarding clothes washing machines and toilets in both 2004 and 2005. **Chart 7** shows that within the past three years, 37% of all households purchased a new clothes washing machine (34% in 2004). Among these households, one-half (19%) purchased high efficiency washers and almost half again used a voucher or rebate program to do so (42% of the 19% = 8% of all households and 22% of new washer purchases)—percentages very much consistent with 2004.

Among the 22% of new washer purchasers who used a voucher or rebate program to purchase their high-efficiency washer, 75% learned of the voucher from the store where they made the purchase and 86% said that they would have made the purchase even without the voucher or rebate (87% in 2004).

- | |
|---|
| <p>Groups most inclined to purchase high efficiency washers during the past three years were:</p> <ul style="list-style-type: none">▪ Income \$75,000 or more (26%--approximately 1.5 times the percentage that purchased standard washers),▪ 4 or more residents in the household (26%--approximately equal to the percentage that purchased standard washers),▪ Homeowners (23%--approximately 1.2 times the percentage that purchased standard washers). |
|---|

Chart 7

Washing Machine Purchase



Q9, Q9a, Q9b, Q9c

- Groups least inclined to purchase high efficiency washers during the past three years were:
- Households of 1-3 persons (16%--approximately equal to the rate of standard washer purchases),
 - Renters (10%--approximately two-thirds of the percentage that purchased standard washers),
 - Income under \$25,000 (5%--one-third the percentage that purchased standard washers).

Regarding new toilet purchases, 18% of households indicated that they were very likely to purchase a new water saving toilet if they learned that the \$75 rebate were going to end in the next 12 months (**Chart 8**). Another 14% were less committed, indicating that they would be somewhat likely, and 67% either were somewhat unlikely (13%), very unlikely (34%), or already had made all these purchases (20%). In the 2004 survey 42% of respondents indicated that they had purchased at least one toilet since 1992, which is when all new construction began mandatory installation of such toilets. This is somewhat puzzling when compared to the 20% in 2005 who said that they had already made such a purchase. It is possible to explain this difference if the 42% since 1992 represents purchases of a toilet for the house but not replacements for all toilets in the house.

- Groups most inclined to purchase a new water saving toilet if the voucher program were ending are:
- Ages 45-54 (39% very likely),
 - Homeowners (26% very likely).

- Groups least inclined to purchase a new water saving toilet were:
- Renters (54% very unlikely),
 - Ages 25-34 (49% very unlikely),
 - Ages 65 and older (46% very unlikely).

New to the survey in 2005 are questions about water softeners. **Chart 9** indicates that 15% of San Diego County Water Authority households have water softeners in their home. These systems are divided among On-Demand Systems (25%), Preset Timer Softeners (23%), and Canister Replacement Systems (36%). Another 16% do not know what type of system they have.

- Homeowners (19%) are more likely to have water softeners than are Renters (8%).
- Those who have done graduate work (22%) have more water softeners than do all other levels of education (14%).
- No Spanish language survey respondent has a water softener.

Chart 8

Likelihood Would Purchase New Water Saving Toilet in Next 12 Months if Learned Voucher Program will End

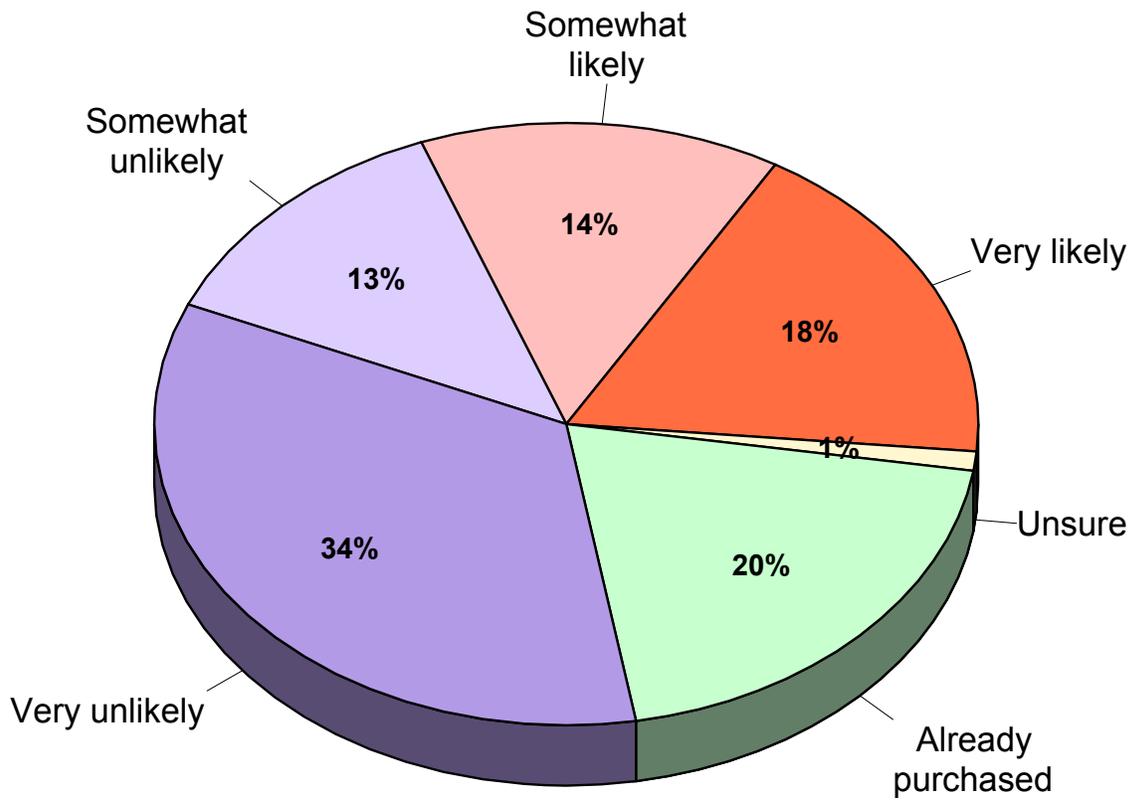
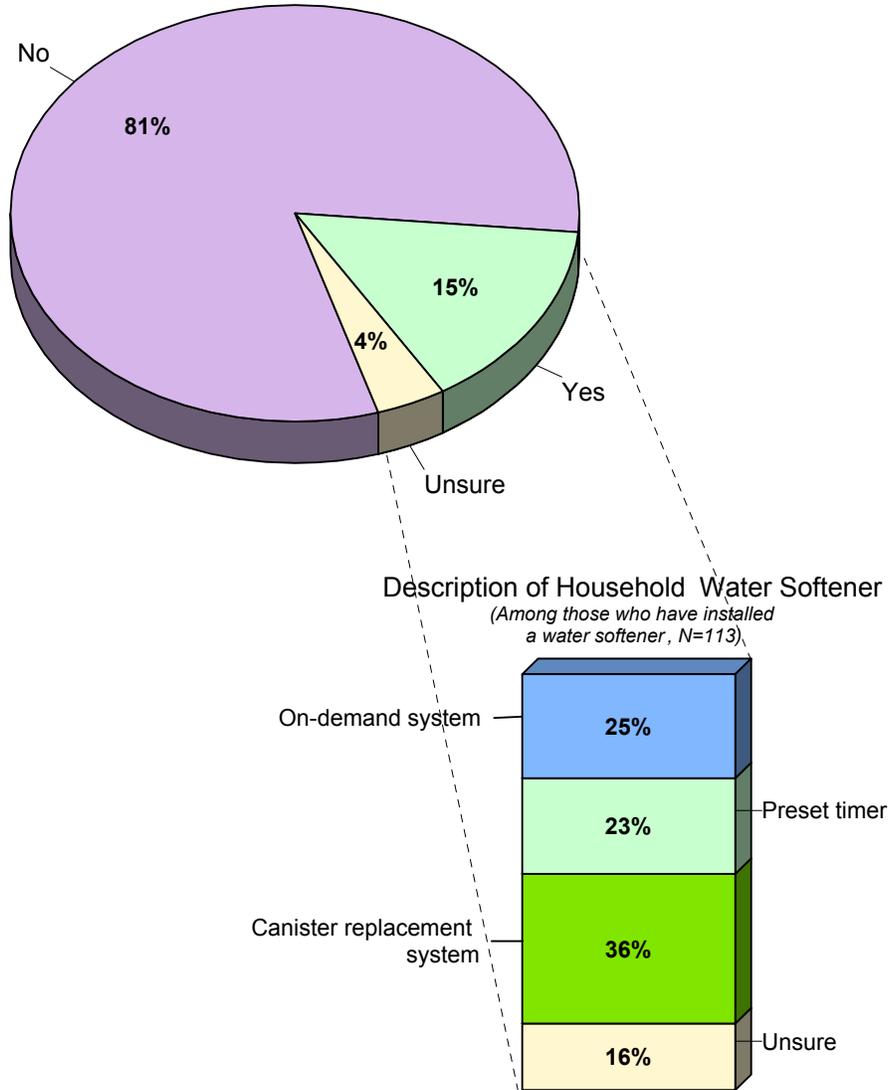


Chart 9

Household Installed Water Softener



Q16, Q16a

Considerable attention is devoted in the 2005 survey to outdoor water usage and conservation. **Chart 10** shows that 68% of the population has some landscaped area for which their household is responsible—a percentage exactly the same as in 2004 and similar to that in the 2003 survey (65%). A majority of these households have automatic sprinkler systems (59%)—in 2004, 53% so indicated. Those 59% with automatic systems averaged 3.76 adjustments to their automatic system during the past twelve months, and more than three-fourths (77% of those with automatic controllers—71% in 2004) have adjusted their automatic controller two or more times during the past year—13% (11% in 2004) having made no adjustments at all.

Groups with the greatest degree of landscaping responsibility are as follows:

- Homeowners (84%),
- Incomes \$75,000 and over (82%),
- Ages 55-64 (82%),
- Graduate education (81%),
- Native Americans (78%),
- Ages 45-54 (76%),
- Residents of the community for 11 years or more (75%),
- Registered voters (73%),
- Whites (73%),
- Two or more in household (72%),
- Ages 65 and older (72%),
- Income \$50,000-\$74,999 (72%).

Groups that adjust their automatic sprinklers more frequently are:

- Ages 55-64 (mean =4.03 times per year),
- Bachelor's Degree or more (3.90 times),
- Income \$50,000 and over (3.84 times).

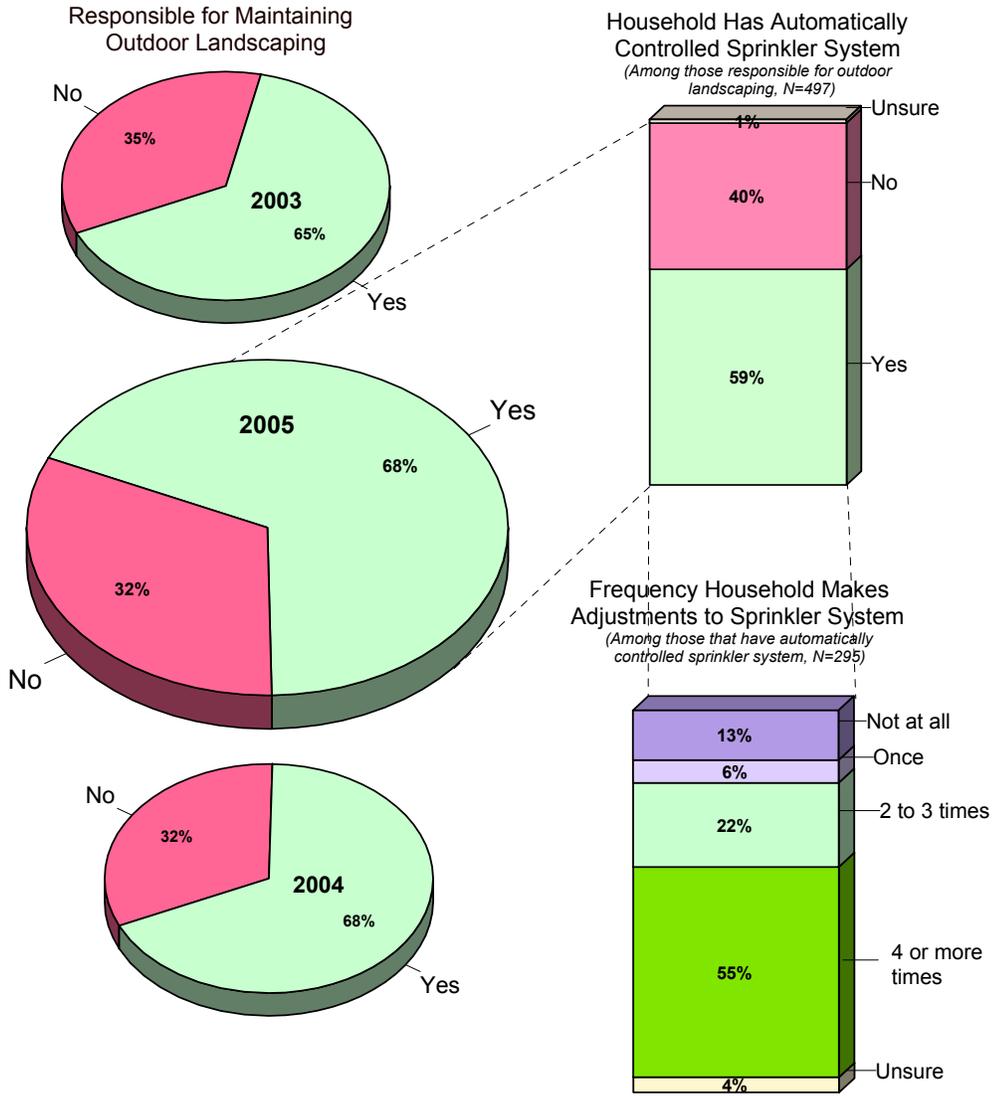
Groups that adjust their automatic sprinklers less frequently are:

- African-Americans/Blacks (mean =1.67 times per year),
- High School education or less (2.29 times),
- Income under \$50,000 (2.57 times),
- Renters (2.78 times),
- Ages 65 and older (3.01 times).

Among those 68% with responsibility for some landscape, 29% have heard about weather-based irrigation controllers that automatically adjust landscape watering based on changing weather conditions (**Chart 11**). Only 9% of the 29% who had heard about these controllers had actually had one installed. Working back to the total population, these 9% represent less than 2% of all households in the service area.

Chart 10

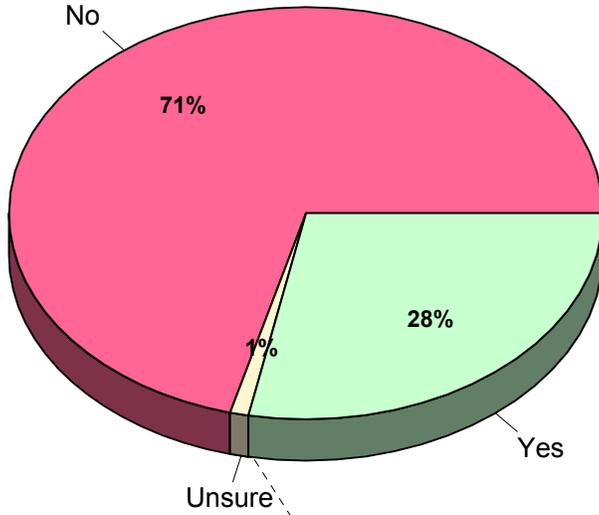
Outdoor Landscaping



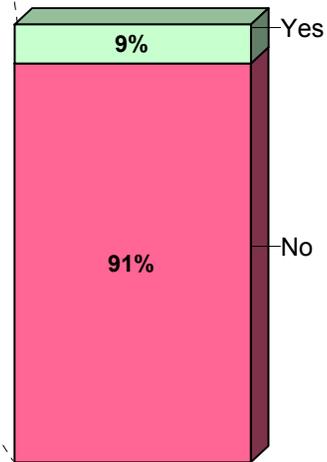
Q11, Q12, Q12a

Chart 11

Heard About Weather-Based Irrigation Controllers
(Among those responsible for maintaining outdoor landscaping, N=497)



Household Has Installed a Weather-Based Irrigation Controller
(Among those who have heard about weather-based controllers, N=141)



Q13

Significant differences exist among the following groups in terms of their having heard about automatically adjusting weather-based irrigation controllers:

- Native American respondents (43%) more than Blacks/African-Americans (9%) and Asians (13%),
- Graduate education (36%) more than High School or less (14%),
- Men (40%) more than Women (18%).

▪ Residents of 10 years or less were much more likely to own a weather-based controller (32%) than those who had lived in San Diego County for 11 or more years (4%).

▪ Residents 34 years of age and younger were also more likely to own one (31%) than were those between the ages of 35 and 54 (2%).

Again among the 68% with some landscape responsibility less the 2% who already have weather-based controllers for a total of 66% of the population, the following question, including explanation, was posed: “With a weather-based system, you do not have to make adjustments yourself for daily changes in the weather. The controller senses rain, temperature, and humidity and automatically adjusts irrigation. Typically, you can purchase a weather-based control system for less than \$200. How likely, if at all, are you to purchase a weather-based controller during the next 12 months?” Once explained in this manner, 35% said that they are very likely (10%) or somewhat likely (25%) to purchase a weather-based controller in the coming 12 months (**Chart 12**), with 49% very definitely not interested.

Using a scale of 1-5 (1= very likely to purchase a weather-based irrigation controller and 5= very unlikely to purchase), the following groups are more likely to purchase a weather-based controller

- Incomes \$75,000 and above (2.75),
- Ages 18-34 (2.81),
- Three or more persons in the household (2.88).

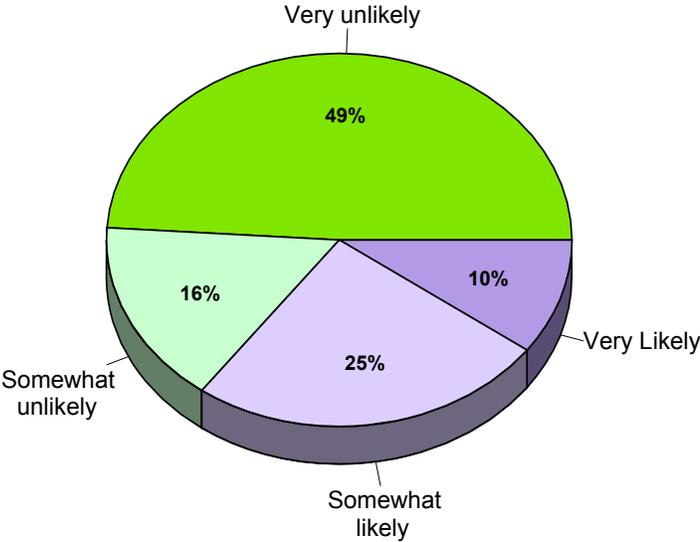
Using the same scale, the following groups are particularly unlikely to purchase the controller

- Ages 65 and older (3.33),
- Income under \$75,000 (3.29),
- 1-2 persons in the household (3.25).

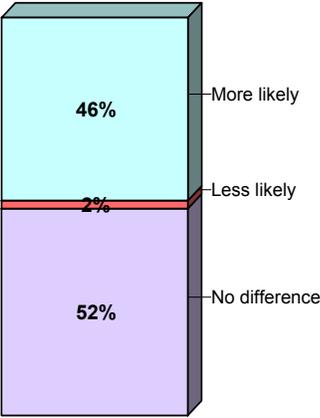
When told that a \$65 voucher is available to aid in the purchase of a weather-based irrigation controller, 46% of the 66% (30% of the total population) indicated that it would make their purchase more likely and 52% (34% of the total) said that it would make no difference in their decision (**Chart 12**). Greatest movement in terms of increased likelihood was among those already very likely (79%) or somewhat likely (81%) to make that purchase—77% of those very unlikely stated that the availability of a voucher made no difference to them.

Chart 12

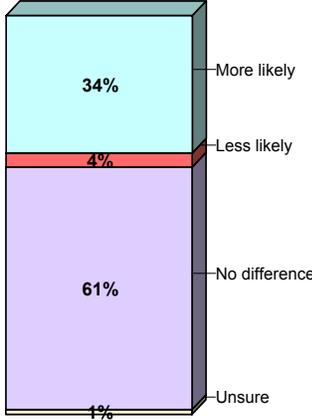
Likelihood Will Purchase Controller in Next Twelve Months
(Among those responsible for outdoor landscaping who have not installed weather-based controller, N=485)



Likelihood Will Purchase Controller Due to Voucher
(Among those who have not installed weather-based controller, N=485)



Likelihood Will Purchase Controller Due to Water Bill Savings
(Among those who have not installed weather-based controller, N=485)



Q13, Q13c, Q13d

Fewer residents with landscaping responsibility are moved toward purchase by the information that this controller could cut \$30 per year from their water bill (**Chart 12**—34% more likely to purchase and 61% no difference). Once again, positive movement is most pronounced among those already interested (very likely purchasers are 70% more likely and somewhat likely purchasers are 53% more likely), and for those very unlikely, this information makes no difference (80%).

Those whose likelihood of purchasing a weather-based controller increases when told of the voucher are also more inclined to have their likelihood of purchasing such a controller increased by the \$30 annual savings. Among those more likely to purchase a weather-based controller because of the voucher, 62% were more likely to purchase the controller also because of the \$30 savings and for 37%, the savings made no difference. In the reverse, 82% of those who were interested by the \$30 savings were also interested by the voucher.

- Residents 25-34 years of age and 35-44 were much more likely to purchase a weather-based controller (65% and 53%, respectively) after hearing of the voucher than those who were younger than 25 or 45 and older, especially so for those 65 and older (32%).
- Democrats were interested by the voucher (55%) more than were all other residents (45%).
- The voucher caused a higher degree of likelihood among those who earn \$75,000 per year or more (55%) than among those earning \$50,000-\$74,999 (44%) or under \$50,000 (36%).

- The \$30 per year savings increased interest in purchasing a weather-based controller significantly only among households with 3-6 persons (44%) versus all others (28%).

Chart 13 shows that 71% of all households have seen or heard the Water Authority’s messages during the past two summers to conserve water. Television has been the primary source of this information (57%), followed by radio (20%) and newspapers (11%). There are many significant differences among groups in seeing and hearing these messages and the medium where they were noticed.

Those groups that have most often seen or heard the Water Authority's messages the past 2 summers are:

- Residents of the region for 31 years or more (82%),
- Ages 55 and older (82%),
- Native Americans (78%),
- Ages 45-54 (76%),
- Whites (75%),
- Homeowners (74%),
- Registered voters (74%),
- Some College or more (73%).

Those groups who have noticed these messages the least are:

- Ages 18-24 (37%),
- Not registered to vote (51%),
- Residents for 1-10 years (57%),
- Latinos (58%),
- Asians (58%),
- High School education or less (58%).

Regarding where they saw/heard these messages:

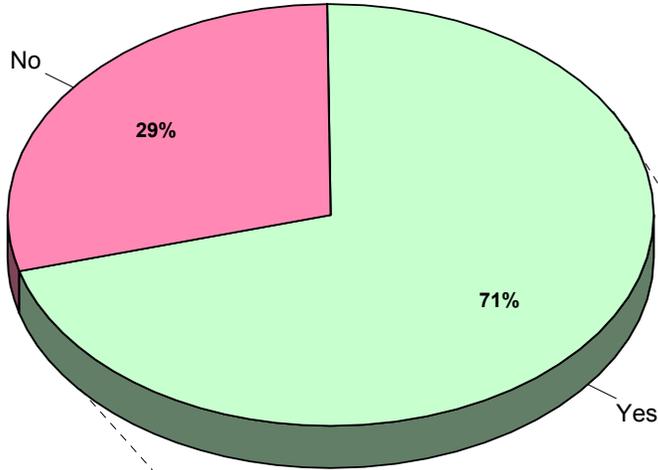
- Women saw or heard them on television more than did men (63% versus 51%), but men heard them on radio more (23% versus 16%) or read them in the newspapers (15% versus 7%).
- Renters were reached by television (61%) more than were homeowners (56%).
- Those with Some College or less learned of these messages by television (69%) more than did those with Bachelor's Degrees or more (46%).
- Those with Some College or more learned by radio (22%) more than did those with High School or less (5%).
- Ages 18-24 and 25-34 noticed these messages on television (73% and 63%, respectively); whereas ages 25-64 were more radio oriented (24%) than were those under 24 (9%) or 65 and older (8%).

Among respondents who have both landscaping responsibility and heard or saw the messages, 72% recall having taken specific steps to reduce their outdoor consumption of water in response to those messages or have taken previous steps. **Chart 14** depicts the steps that they undertook. A reduced number of days watering and a generalized statement that water consumption was reduced (either by reduced duration of operating the sprinklers and/or by reduced number of days watering) were the most frequent response (27% each), followed by irrigating during off-peak hours (14%) and adjusting the duration of watering (13%).

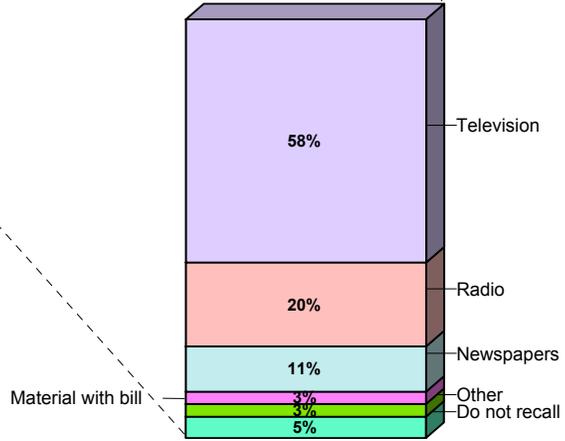
Response in terms of taking conservation steps was greatest among those with earnings of \$50,000 per year or more (82% took steps) and lower among those earning under \$25,000 (61%) or \$25,000-\$49,999 (69%).

Chart 13

Heard SDCWA Water Conservation Messages



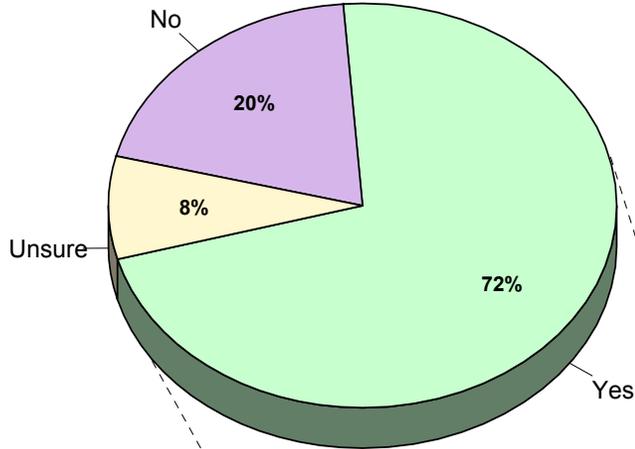
Where Heard Messages Most Often
(Among those who have heard messages; N=518)



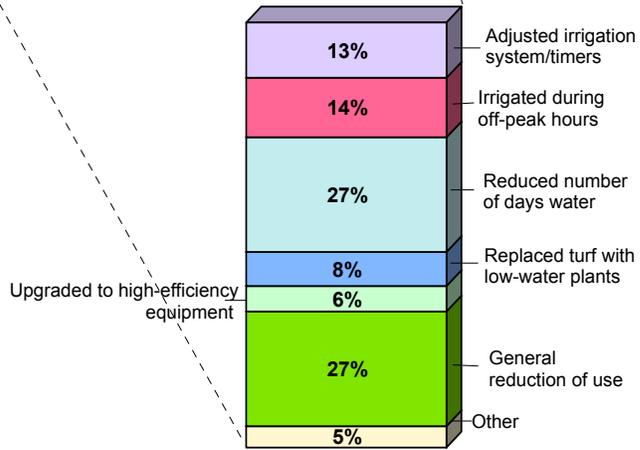
Q14, Q14a

Chart 14

Recall Steps Taken to Reduce Outdoor Water Usage
(Among those who heard messages and responsible for outdoor landscaping, N=366)



Major Step Taken to Reduce Usage
(Among those who have taken steps to reduce outdoor water usage, N=259)



Q15, Q15ar

Attitudes and Perceptions Concerning Recycled Water and Seawater Desalination

SUMMARY: *There is considerable agreement with San Diego County Water Authority efforts to improve reliability and diversity of water supply through utilizing recycled water and seawater desalination. Out of eight potential uses of recycled water offered to residents, 7 were strongly supported and one well supported—all notably more so than in 2004, when support was still very good. This support derives in large part from homeowners and higher income, better educated, older residents who also tend to be White and do not associate developers with causing growth.*

Water recycling is seen as being a more important program for the Water Authority to follow than additional water storage, seawater desalination, and even conservation; however, some of this apparent preference for water recycling appears to be very fluid and may be influenced, in part, by the fact that many survey questions focus upon water recycling. Nevertheless, residents of the region have stated with clarity that they do want their water supply to be as reliable as possible and that they will clearly entertain a vast array of programs and policies that can accomplish that for them.

Both the 2003 and 2004 surveys showed very substantial support for developing drinking water from desalinating seawater (in excess of 70% support). It was, therefore, decided to minimize that portion of the resident poll for 2005 by asking only one question about seawater desalination. Simply put, the question asked the residents their preference between using seawater desalination to develop more drinking water and importing more water for that purpose. Consistent with prior studies, 69% of residents prefer seawater desalination (**Chart 15**).

The only significant differences in support for seawater desalination are found between those households that earn under \$25,000 per year (63%) or those who earn \$100,000 or more (64%) and those that earn \$25,000-\$99,999 (71%).

Recycled water is also favored as a source of alternative water supply under many circumstances. **Chart 16** shows that the strongest support for using recycled water comes when it is used for watering landscape along freeways and golf courses (96%, of whom 88% strongly favor such use), watering sports fields and parks (91%--78% strongly), watering landscape and common areas in multi-family housing (89%--72% strongly), industrial processing (87%--72% strongly), watering residential front yards (87%--68% strongly), watering playgrounds at schools (81%--63% strongly), and agricultural irrigation (78%--60% strongly). These all represent huge increases in support over 2004, when support was also strong but less than these very powerful indications of support. Less, but still substantial, support is found for using recycled water for recreational lakes with 63% in favor (39% strongly)—again a major increase over 2004 when the support and opposition were split relatively equally.

Chart 15

Better for Local Water Agencies to Purchase More Imported Water
or Invest in Desalination

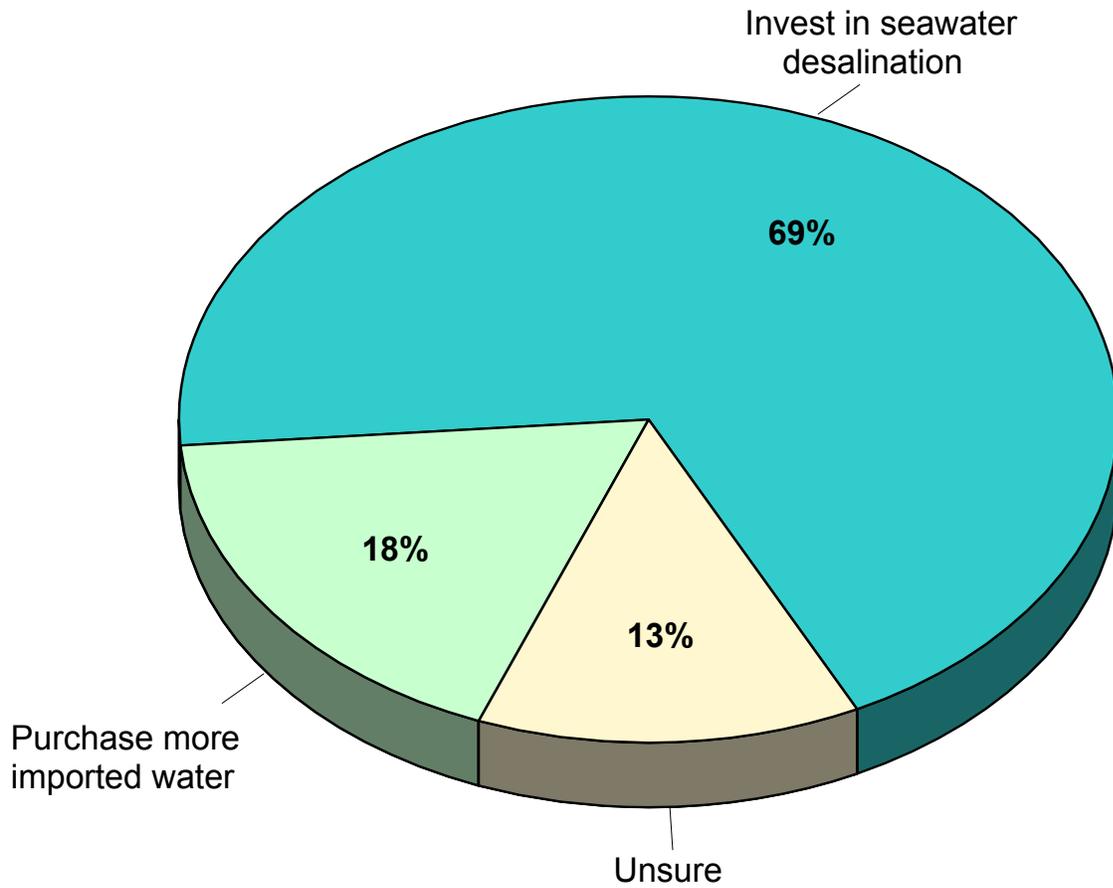
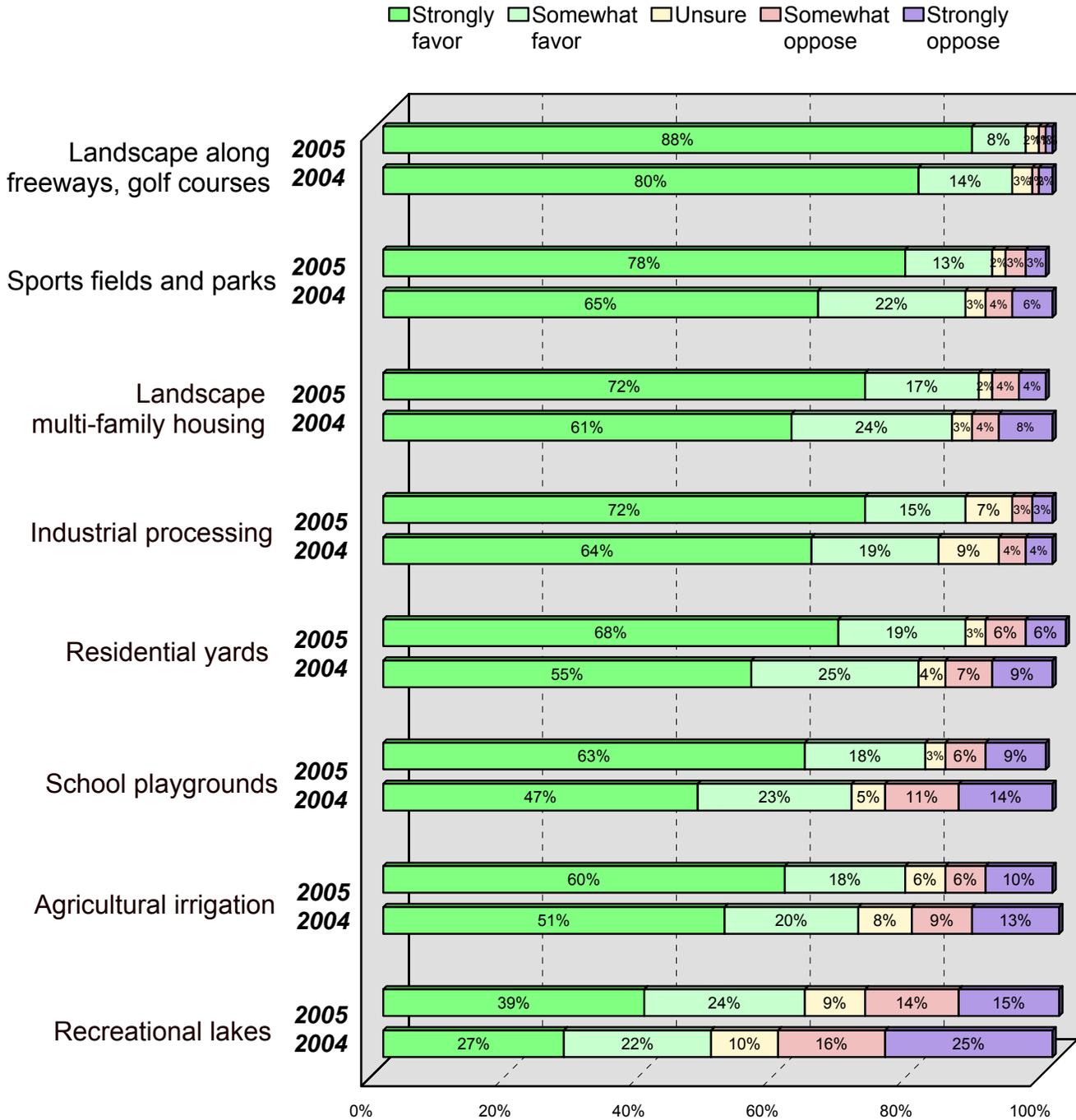


Chart 16

Favor or Oppose Use of Recycled Water for...



Q17_1 to Q17_8

Table 3 utilizes a 4-point scale (1=strongly favor—4=strongly oppose) to show the differences by subgroups in their support for these various uses for recycled water. It is clear that recycled water receives its strongest support from homeowners, better-educated respondents, Whites, higher income, registered voters, older residents, and those who do not blame growth on developers. Weaker levels of support and, in a few cases, opposition comes from lower income and lesser educated respondents, individuals who are not registered to vote, younger residents, renters, and those who tend to blame developers for growth. It is important to note that those individuals who are not registered to vote appear in opposition or weaker support, thereby allowing the conclusion to be drawn that a public vote on some of these uses for recycled water might result in even more support than is evident in the survey.

Chart 17 compares the perceived importance of developing recycled water with the importance of conservation, seawater desalination, and additional local water storage projects. There is a majority for water recycling over developing additional water storage and a plurality over seawater desalination and conservation. Recycled water is comparatively more important than it was in 2004 against all alternatives. Recycled water is thought to be more important than conservation by 46% of the respondents, 35% think that it is less important, and 14% see them as equally important. In 2004, this perception was reversed (37% more important and 46% less important).

<p>Recycling is particularly favored (on a 1-5 scale, with 1=much more important and 5=much less important) over conservation by:</p> <ul style="list-style-type: none">▪ Hispanics/Latinos (2.45),▪ Ages 55-64 (2.49),▪ Residents of San Diego County for more than 40 years (2.52),▪ Whites (2.73). <p>Recycling is seen as less important than conservation by:</p> <ul style="list-style-type: none">▪ Asians (3.47),▪ Ages 18-24 (3.08),▪ Residents of San Diego County for 1-10 years (3.05).
--

Chart 17 also shows that 48% indicate recycled water to be more important than seawater desalination, with 33% thinking that it is less important and 10% equal in importance (2004: 43% more important and 37% less important). Further, 52% feel that recycled water is more important than additional storage projects, with 27% feeling that local water storage is more important and 10% equal (2004: 46% more important and 33% less important). The order of importance remains mostly the same as it was in 2004. Recycling is more important than seawater desalination and even more important, yet, than water storage programs; however, in

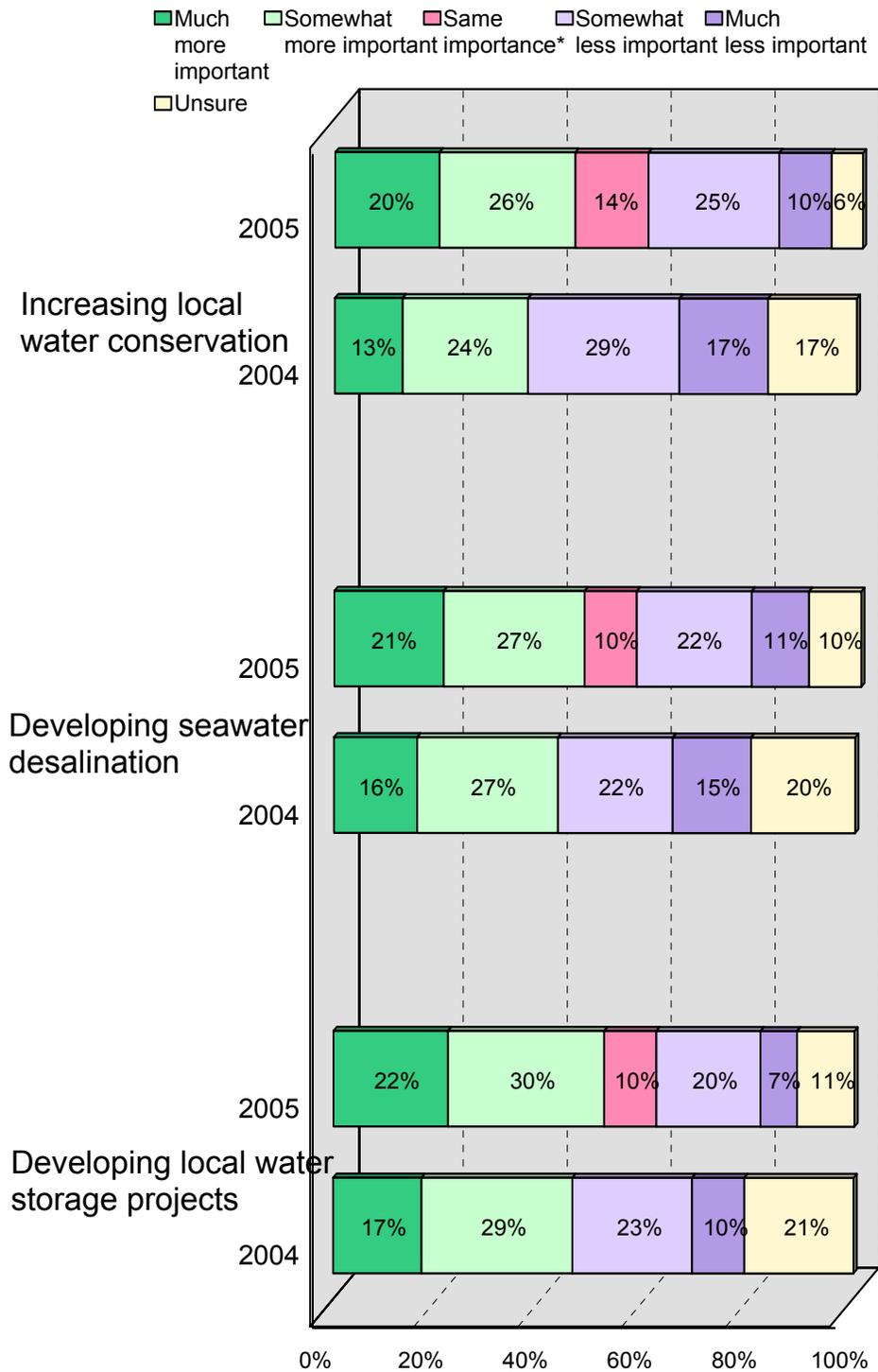
2005, recycling is now also more important than conservation (in contrast to 2004), but less so than it is against the other two alternatives.

Water recycling is particularly favored (on a 1-5 scale, with 1=much more important and 5=much less important) over seawater desalination by Spanish language respondents (1.54). It is favored over water storage by households with 2 or more persons (2.47) versus 1 person households (2.84).

Table 3					
Statistically Significant Differences in Support for Various Potential Uses of Recycled Water					
(Scale 1=Strongly Favor—4=Strongly Oppose)					
Potential Uses of Recycled Water	Overall Mean Index	Statistically Significant Differences			
		Stronger Support		Weaker Support	
Freeway/Golf Landscape	1.15	Ages 55-64	1.06	Ages 18-24	1.31
		Income \$50K+	1.09	Hispanics/Latinos	1.28
		Bachelor's Degree + Whites	1.09	Income under \$25K	1.27
		Own	1.10	High School/Less Rent	1.26
			1.11		1.24
Industrial Manufacturing Processes	1.31	Ages 45-64	1.15	Ages 18-24	1.61
		Income \$50K+	1.21	Asians	1.56
		Own	1.22	High School/Less	1.56
		Whites	1.24	Income under \$25K	1.53
		Some College/More	1.26	Not Registered	1.52
		Resident 11 years+	1.27	Rent	1.51
		Registered voters	1.28	Resident 1-10 years	1.44
Sports Fields/Parks	1.31	Income \$50K-under 75K	1.18	Not Registered	1.50
		Own	1.26	Income under \$25K	1.47
		Registered voters	1.28	Rent	1.41
		Growth not caused by developers	1.30	Growth caused by developers	1.54
Multi-Family Common Areas	1.39	Own	1.33	High School/Less	1.60
		Some College/More	1.36	Rent	1.53
Residential Front Yards	1.48	No significant differences		No significant differences	
School Playgrounds	1.60	Own	1.54	Rent	1.75
Agricultural Irrigation	1.63	Own	1.55	Blacks/African-Americans	2.17
		Whites	1.56	Growth caused by developers	2.03
		Growth not caused by developers	1.60	Rent	1.81
Recreational Lakes	2.04	Own	1.98	Growth caused by developers	2.48
		Growth not caused by developers	2.02	Rent	2.18

Chart 17

Importance of Developing Recycled Water Compared to...



Q18_1 to Q18_3

Recommended Policies and Programs

A question was asked in the 2004 survey as follows: “We have talked about a number of water issues in this survey. Considering all we have discussed, what do you think is the most critical thing San Diego County Water Authority should do to ensure a safe and reliable water supply?” This question was asked in an open-ended manner near the end of the questionnaire, just prior to the demographic questions, after many questions had been asked about conservation, seawater desalination, and water recycling, in particular. Not surprisingly, the volunteered responses mirrored the survey orientation and were categorized as follows: Unsure (17%), Utilize Seawater Desalination (15%), More Conservation (12%), and Use Recycled Water (10%)—**Chart 18**. That is, the emphases of the survey instrument were reflected in the responses. In order to combat this bias, the 2005 survey asked essentially the same question (“What do you think is the single most critical thing the San Diego County Water Authority should do to ensure a safe and reliable water supply for San Diego County residents and businesses?”) two times—once early in the questionnaire before anything related to water policy had been addressed and again near the end of the questionnaire, as the final question before demographics, after all of the questions about recycling and conservation, in particular, had been asked.

Chart 19 depicts the two 2005 questions together. The first implementation of the question, unaffected by the survey questions, shows much uncertainty (30%) and a preference for Utilizing Seawater Desalination among all other programs and policies (17%). Conservation (11% including conservation education), More Storage (8%), Quality Control (8%), and Importing More Water (7%) followed, with Recycled Water receiving a relatively small response of 3%. This would seem to contradict the findings discussed in the previous section that recycled water is more important than seawater desalination, conservation, and storage, but is explainable, in part, when examining the second implementation of the question.

For the first implementation of the question, the groups strongest for Seawater Desalination were:

- Blacks/African-Americans (22%),
- Homeowners (20%),
- Ages 35 and older (20%),
- Residents of San Diego County for more than 40 years (19%),
- Registered voters (19%),
- Whites (19%).

The group strongest for Conservation was:

- Latinos/Hispanics (17%).

The groups strongest for Improving Water Quality Control were:

- Blacks/African-Americans (19%),
- Ages 18-24 (17%),
- Not registered to vote (14%),
- Renters (13%),
- Residents of 1-10 years (13%),

The groups strongest for Importing More Water were:

- Ages 45-64 (10%),
- Homeowners (9%),
- Latinos/Hispanics (9%),
- Registered Voters (8%).

The groups strongest for Reservoirs/Storage were:

- Residents for 41 or more years (12%),
- Ages 45-64 (9%),

The groups strongest for Water Recycling were:

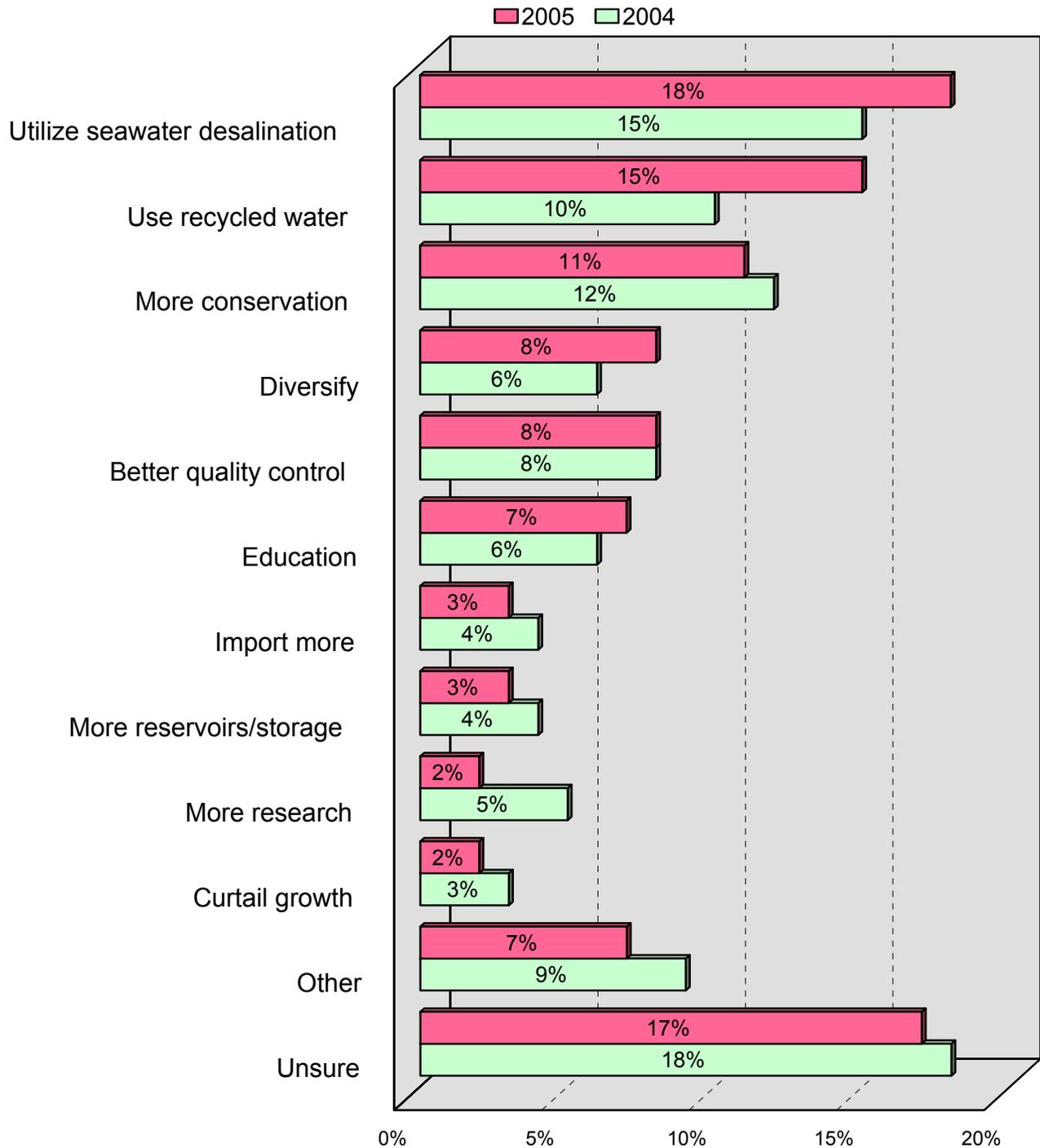
- Asians (7%),
- Not registered to vote (6%),
- Ages 44 and younger (4%).

For the second implementation of the question, uncertainty declined from 30% to 17%. Seawater Desalination increased slightly from 17% to 18%. Conservation grew from 11% to 16% (including conservation education) and Recycled Water took a substantial leap from 3% to 15%. Quality Control and Diversification followed with 8% each. These results are not significantly dissimilar from the 2004 results that occurred when the question was also placed near the end of the survey (**Chart 18**). At first glance, what could be hypothesized is that in 2005 those who were Unsure in the first question switched to Recycled Water as their choice of policy or program, with the others remaining approximately as they were in the first question. It can be hypothesized that the change occurred in response to the last questions in the non-demographic portion of the survey—those pertaining to Water Recycling—and that the degree of preference that the residents of the Water Authority service area show for Water Recycling is, therefore, subject to much flux and influence and is not firmly entrenched.

Further analysis begins to reveal more regarding the flexibility of opinion within the population in terms of preferred policies and programs. When the first answer given is crosstabulated by the second answer, the theorized movement from Unsure to Water Recycling is not quite so well defined. There is great flux in movement from the first implementation of the question to the second among all policies and programs. **Table 4** shows the responses to the second question for each response to the first question for the main response categories.

Chart 18

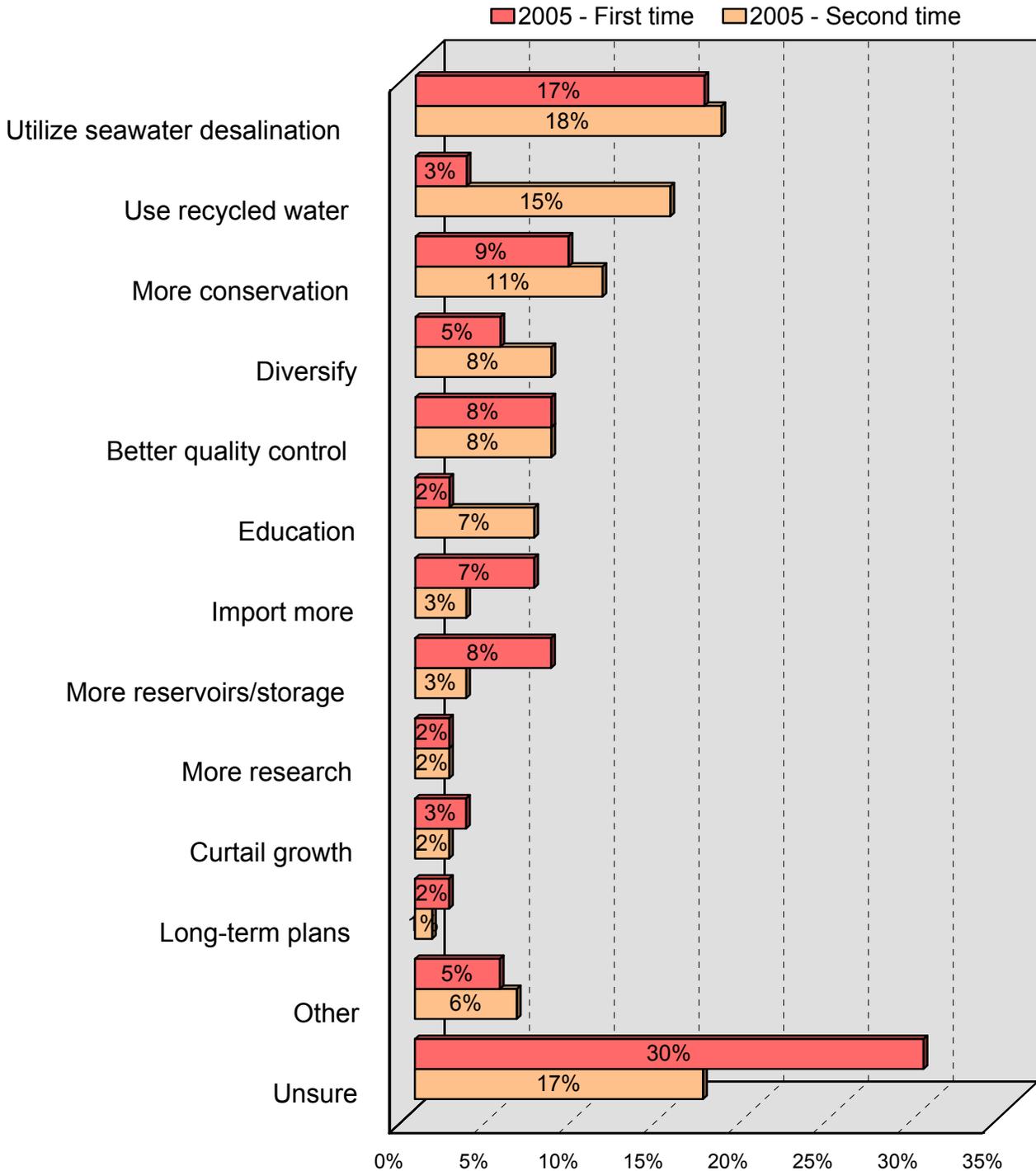
Most Critical Thing San Diego County Water Authority Should Do to Ensure Safe and Reliable Water Supply



Q19CODE

Chart 19

Most Critical Thing San Diego County Water Authority Should Do to Ensure Safe and Reliable Water Supply



Q19CODE

Table 4
Opinion Shifts Between First and Second Implementation
of Critical Policy/Program Question

Policy/ Program	Percentage Response to First Question (q5)	Shifted Opinion in Second Question (q19)
Unsure	30%	Unsure 34% Conservation 14% Water Recycling 12% Seawater Desalination 12%
Utilize Seawater Desalination	17%	Seawater Desalination 48% Recycled Water 12% Conservation 9% Diversify 9%
Conservation and Education	11%	Conservation 38% Water Recycling 20% Seawater Desalination 10%
More Reservoirs/Storage	8%	Seawater Desalination 20% Conservation 20% Improve Water Quality 16% More Reservoirs/Storage 15% Water Recycling 13%
Improve Water Quality Control	8%	Improve Water Quality 26% Water Recycling 18% Conservation 11% Seawater Desalination 9%
Import More Water	7%	Import More Water 22% Seawater Desalination 18% Water Recycling 18% Conservation 12%
Water Recycling	3%	Water Recycling 48% Seawater Desalination 14% Conservation 10% Diversify 10%

Significant group differences also changed from the first to the second question. There are far fewer significant differences in the second question than in the first.

- Men favor Seawater Desalination (20%), but women are stronger for Water Recycling (16%).
- Incomes of \$50,000 per year and more favor Conservation (19%), but improving Water Quality Control is favored more by those earning less than \$50,000 (11%)
- Those aged 55 and older are stronger for Seawater Desalination (23%), whereas those under 55 tend more toward Water Recycling (20%).
- Registered voters are more in support of Seawater Desalination (20%) than are those who are not registered (14%).

What emerges from **Table 4** is not the hypothesized movement of responses from Unsure to Water Recycling, but instead a fluidity of opinion that shows how loosely wedded respondents are to how they wish to have their water supply made as reliable as possible. In no category of the first response did even half of the respondents provide the same answer the second time that the question was administered. Seawater Desalination and Water Recycling came closest to holding their respondents (48% each); whereas, More Reservoirs/Storage and Import More Water lost a great deal of theirs (maintaining only 15% and 22%, respectively). This is not surprising inasmuch as these subjects did not receive a great deal of attention in the survey questions. Within these shifting responses, however, residents of the region have definitely stated that they do want their water supply to be as reliable as possible and that they will support an assortment of programs and policies in that endeavor.

Conclusions

There are strong indications of support for the work and the policies and programs of the San Diego County Water Authority from the region's residents demonstrated in the 2005 Public Opinion Poll.

Residents understand certain of the risks to the future reliability of their water supply, and they are willing to consider local supply development over increased imports (in particular both increased use of recycled water and seawater desalination) to a very significant degree in order to protect and ensure that reliability. Residents have demonstrated an increased confidence over the past three years in the Water Authority to provide a reliable water supply not only at present, but also well into the future.

There is strong recognition of the Water Authority's conservation messages during the past two summers, and residents have responded through very specific, recommended actions.

Although there is some fluidity in choosing a preferred option for the Water Authority to provide water in the future, residents of the region have stated with clarity that they do want their water supply to be as reliable as possible and that they will clearly entertain a vast array of programs and policies that can accomplish that for them.

The results of this survey should be viewed as ratification by the public of the importance of the work done by the Water Authority and as an expression of the confidence of the region in the value and quality of the work in which the Water Authority is, has been, and will be engaged.